

A Guide to Arts and Culture Opportunities in Mainland China

September 2025





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Enke Huang Consulting: The research was led by Enke Huang, responsible for methodology, expert recruitment, interviews, insights generation, the writing of the final report, and project management. Dr Guanhua Su was commissioned as research collaborator, contributing specialist expertise and writing on regional development and cultural policies.

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Foreword

When the British Council opened its offices in China in 1979, China was emerging from a period in which it had been largely closed to the outside world for decades. It would have been almost impossible to imagine the breadth, depth, and sophistication of exchange between China and the UK that exists today in culture and education.

Much has changed since then, but the importance of culture as a space for dialogue, creativity and shared experience remains constant. At a time when international relationships are under strain and the political landscape is shifting, arts and cultural exchanges offer something distinctive - a chance for people from both countries to connect, not through headlines or official visits, but through people, ideas and art. Exchanges in culture and education remain among the most effective means for the UK to connect with young Chinese who are shaping the China of today - and will shape its direction for decades to come.

That exchange now takes place in a far more challenging context. The UK-China relationship is going through a period of readjustment. Political and economic concerns are being weighed with care, and the UK Government is clear that engagement must now be more strategic, cautious and “clear-eyed”. At the same time, both governments continue to recognise the long-term value of people-to-people links - including through the work of the UK’s Soft Power Council. This guide supports that ambition, not through top-down messaging, but through practical, grounded advice drawn from experience.

China’s cultural landscape is vast, complex and fast-evolving. It is shaped by powerful national strategies, growing cultural confidence, and a dynamic digital ecosystem. But it is also a place of nuance, regional diversity and fast-paced change. This guide is for UK artists and organisations - across all four nations - who want to understand China’s cultural sector and explore ways of working within it. It brings together sector-specific insight, regional context and practical advice to support

meaningful collaboration. We hope organisations large to small, with different levels of experience in engaging with China, will benefit from the tools this report offers for planning your approach, identifying potential partners, and understanding the wider context in which you’ll be working.

The report draws on lived experience - from individuals and organisations who have toured, co-produced or partnered in China, and from our contacts and partners in the Chinese cultural sector who reflect on what has worked and what hasn’t. The report includes snapshots of different art forms, examines the policy landscape that drives the Chinese cultural sector, and offers guidance on navigating policy and practicalities.

The UK’s cultural sector has a long history of engagement in China and some of our major institutions regularly present world-leading art, music and drama to large audiences across China. But the UK’s cultural offering goes beyond national institutions and cultural links can and should be built across the regions and all four nations of the UK.

We know that Cultural relations take time. The British Council’s experience has shown that meaningful partnerships often begin informally - with a conversation, a short visit on a delegation, trying out a small collaboration project - and develop over months or years into deeper forms of collaboration. As you will read in the report, organisations that have built successful links with China speak consistently of the importance of trust, local understanding, and working with experienced partners who know the terrain.

I want to thank our researchers Enke Huang and Dr. Guanhua Su and all the consultees to this report. Huge thanks too, to Dani Wu and the China Arts team at British Council China for all their contributions and feedback based on long experience of supporting artistic and cultural collaboration between the UK and China.

Dom Hastings
Head of Arts, British Council China

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Introduction

Why this Guide now

China is often seen as attractive due to its sheer scale - yet there's much more to it than numbers. It's one of the most dynamic and diverse cultural markets in the world, with enormous room for growth, a strong appetite for international exchange, and remarkable energy for innovation - from experimental theatre, immersive museums, to digital heritage technologies and creative retail.

For UK stakeholders, this presents exciting opportunities and complexity. The cultural sector in China is shaped by fast-moving market shifts, evolving policies, regional diversity, a distinct digital ecosystem, and changing global relationships. Engaging effectively requires genuine curiosity, adaptability, and strategic awareness.

What this Guide offers you

This guide provides the latest cultural policy development and market insights in Mainland China and identifies areas of opportunity that align with UK priorities, such as creative technologies, heritage revitalisation, digitisation, skills development and so on. It combines sector-level data with first-hand insights from UK and Chinese professionals, as well as offers practical suggestions that aim to help stakeholders take confident next steps.

Whether you are a freelancer, festival director, museum manager, musician, or filmmaker, this guide is designed to help UK individuals and organisations understand the landscape of China's arts and culture sector, avoid common pitfalls, and build long-term, meaningful partnerships with Chinese counterparts.

Whether you're exploring China for the first time or looking to expand an existing relationship, this Guide offers ideas, case studies, data and tools to help inform your actions.



How this Guide is structured

This Guide is structured for flexibility and accessibility: you can dip into the sections that match your interests, or read it cover to cover for a fuller picture.

- **Setting the scene** – Cultural, social and digital context for understanding contemporary China, as well as the overview of China's cultural sector, offering national-level data and insights.
- **Cultural policy landscape** – Overview of China's governance system and cultural policy directions shaping international collaboration.
- **Sector deep dive** – Each Sector includes a 40-year sector development timeline, market overview, key market trends and newest case studies of international collaboration between UK and China.
 - Performing Arts
 - Visual Arts, Heritage and Tourism
 - Music
 - Film
 - Literature
- **Regional profiles and cultural highlights** – Cultural policy and creative infrastructure snapshots across North & Central, East, South, and Southwest China.
- **Appendix** – About this project, methodology, author information and acknowledgement.

While there is no one-size-fits-all approach to working with China, this Guide offers a well-informed, experience-based starting point. Successful UK-China collaboration is not about exporting ready-made projects. It's about listening, adapting, and building mutual trust over time. We hope this Guide helps you take the next steps with confidence and creativity.

A thick yellow line starts from the top right, curves downwards to the left, and then curves upwards to the right.

Setting the scene: Engaging with contemporary China

Why context matters

To build successful cultural collaborations in China, UK stakeholders should start by understanding the broader context shaping China's cultural production today. The China of 2025 is not just a nation of scale, it is diverse, digitally advanced, and undergoing rapid social and cultural transformation. A growing sense of cultural confidence, powerful national strategies and a unique digital ecosystem all influence how culture is produced, shared, and experienced. Naturally, the evolving context creates both opportunities and complexities. The path to effective engagement lies in listening, adapting, and cultivating long-term, reciprocal relationships.

The socio-cultural context

Diversity

- China is home to 1.4 billion people, encompassing a wide range of perspectives and experiences. While international media often reduce China to numbers or political headlines, real collaboration depends on appreciating the country's cultural and social multiplicity. **To truly engage with China, it's essential to move beyond generalisations and appreciate the rich diversity that defines the country.**

Power and social values

- **High-power-distance culture:** Authority is centralised to a few, given China's size. Cultural content is closely monitored. Creators and institutions often anticipate regulatory shifts and adjust output accordingly.
- **Collective and individualistic:** While Chinese traditions favour collective narratives ("We") over individual gain ("the Self"), China has many different faces and voices. It's a nation of diverse individual expressions and contradictions. It is at once wealthy and impoverished, metropolitan and rural, nationalistic and yet increasingly global and progressive.

Fast-paced urban life

- **Social pressure:** China is in the midst of one of its most profound transformations since opening its doors to the world four decades ago. Beyond the headlines, millions of people—especially in urban areas—are working under intense conditions, with many following the "996" work schedule (9 am to 9 pm, 6 days a week), driving the economy forward. Rapid economic growth has led to significant social changes, including high social mobility, pressure, digital dependency, and a prolonged pandemic contributing to social disconnection and digital anxiety. This drives both a need for cultural escapism and a hunger for meaning.

Growing cultural confidence

- Decades of deep globalisation and overlooked traditions have led to the emergence of 'China Pride': a growing movement that focuses on rediscovering, modernising, and celebrating Chinese identities based on cultural heritage. It is a genuine development that has helped Chinese people restore a sense of belonging after the challenging period of the pandemic as well as supported by national strategies.
- **This rising cultural confidence is changing how Chinese audiences and institutions engage internationally.** Foreign content is still welcomed, but only when it's high-quality and locally attuned. China is no longer just learning from the world—it is helping shape the global cultural conversation. UK stakeholders must approach collaboration as co-creation, not cultural export.

The digital context

- **An entirely distinct digital world:** In just 30 years, China has built its hyper-connected digital ecosystem permeating payment, engagement and entertainment, and leading innovation on many fronts. It is important for UK stakeholders not to assume what might work for other countries would work for China, not just because of the socio-cultural environment, but also its advanced digital landscape - platforms like WeChat, Douyin, and RedNote (Xiaohongshu) are more than apps—they are essential to daily communication for life and for work, content creation, and cultural consumption.
- **Working in China means working on WeChat:** With mobile devices surpassing PC usage in 2013 and that 99.8% of Chinese internet users accessing the web using mobile phones (86% in the UK), China has a highly complicated, mobile-first cultural economy where digital engagement drives consumption, creativity and community building. The key is WeChat. Everything from scheduling to contracts can happen on WeChat. It's useful to set up and learn WeChat before engaging with partners, which is often a sign of respecting their digital rhythm.

The arts and culture context

Culture as a national strategic pillar

- **Culture is central to China's soft power and economic vision.** Culture has been embedded in its 15-year and 5-year plans since 2020. Key priorities include cultural digitisation¹, artificial intelligence, immersive technologies, and raising industry standards. Stories rooted in Chinese traditions are being reimaged across film, theatre, literature, and digital media, with strong support from both the state and the public.
- **Culture meets innovation:** China is also integrating innovation and heritage to grow audiences, generate revenue and expand its global cultural presence. From AI-restored manuscripts, VR tours of heritage sites, live streamed traditional dances on Douyin, it's pioneering how technologies can support and empower culture production, preservation, participation and consumption.

Cultural consumption on the rise

- **China's cultural audiences are growing - in size, sophistication and expectations.** Visiting museums, attending festivals, and engaging in arts are now key leisure activities. Particularly younger generations, shaped by global content exposure, demand quality as well as novelty.
- **Arts and culture as leisure, learning and comfort:** In a society marked by high pressure and digital fatigue, arts and culture offer emotional connection and respite. Audiences increasingly seek authenticity, meaning, emotional resonance and moments of calm—making cultural engagement both a lifestyle and a coping strategy.

A highly active yet still maturing cultural industry

- **China's cultural sector is expanding rapidly but remains fragmented** - shaped by a mix of state-led policy, powerful state organisations, private investment, and a large number of grassroots networks. Government strategies often set national direction, while private firms drive platforms and activities. Real estate developers, once major patrons of cultural districts and institutions, now face financial constraints but remain key stakeholders in urban cultural planning.
- **Cultural infrastructure: big growth and big gaps.** With more theatres, museums and cultural spaces built in the past two decades than at any other point in its history, China's infrastructure has outpaced skills. Many venues lack trained staff of technical and managerial expertise. The general arts and culture industry lacks a support system for talent development and retention. Despite increased professionalism and contributions from the new generation of artists and cultural practitioners - educated abroad and returned - their long-term career pathways remain unclear. **This presents clear opportunities for UK institutions to support training, capacity-building, and industry standard shaping.**



A snapshot of China's cultural sector

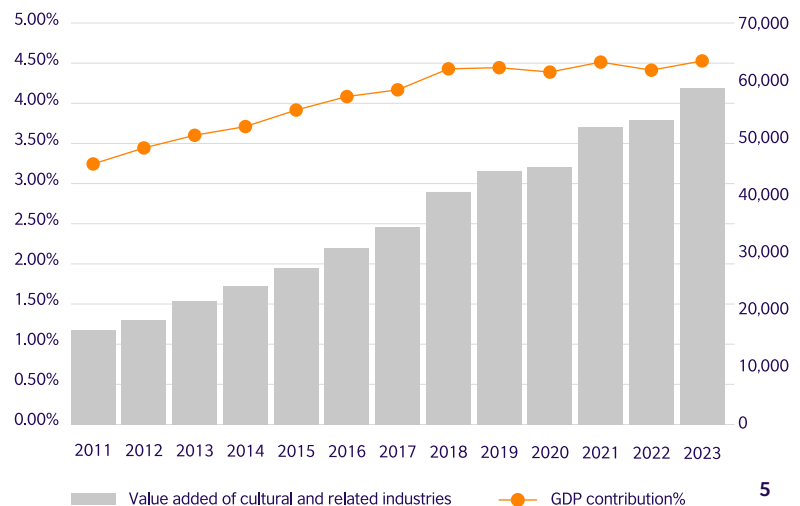
Value Added of China's cultural industry² in 2023 is **£655 billion** - nearly **4x** that of the UK³ (£167.4 billion).

Adjusted for population⁴, UK's **per capita value** (£2449) is **5x** China's (£464 pp), highlighting room for growth.

12% average annual growth over the past decade signals rapid expansion.

4.59% of China's GDP in 2023, up from 3.28% in 2011, still below the UK's 7.1% GDP share.

2011-2023 Value Added of China's Cultural and Related Industries (billion yuan) and its GDP contribution (%)

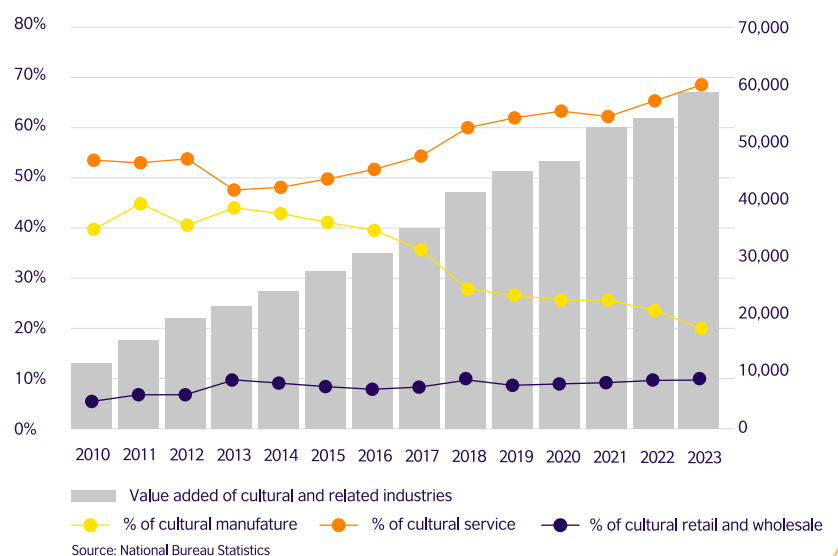


5

China's cultural sector is moving from manufacturing to services and retail. From 2010 to 2023:

- **Services** continue to drive growth from 53.2% to 69.2%.
- **Manufacturing** share fell from 44.5% to 20.5%.
- **Retail and wholesale** doubled from 5.6% to 10.3%.

2010-2023 Value Added of China's Cultural and Related Industries (billion yuan) and Comparison of the Three Main Categories (%)



Practical recommendations for UK partners

1. Visit China

First-hand experience dismantles stereotypes. UK professionals who have visited speak of a dynamic and welcoming society with new infrastructure, cultural vibrancy, and hospitality. Visiting builds confidence, allows revelation of regional diversity and fosters nuanced partnerships.



“

The conversations with those who've been to China and those who haven't are very different! Gaining a cultural understanding of China before engaging and keeping an open mind to learn about the culture are important.

—Andrew Lansley, Innovation Manager, Cheltenham Festivals

“

Going to China has been significantly easier. Before, it was hard to get WeChat as it used to require a Chinese bank account, and there wasn't much English in train stations, but now it's so much easier...When I first went to China in 2006, it was a developing country with almost only black and white cars and without traffic systems. When I go to China now, it's like we are a developing country (laugh). I became more familiar going there, so I no longer have cultural shock and get more relaxed and confident.

—Sid Peacock, composer and artistic director, Surge Forward Music & Arts

2. Connect with UK-based Chinese communities and networks

Many Chinese artists studying or working abroad return home with international perspectives, making them invaluable bridges and sources for insights.

“

Every 5 years, a new wave of Chinese creatives emerges in the UK.

—Contemporary gallery director, UK

“

The music world is small. Connecting with Chinese musicians in the UK is important. Even though China is full of billions of people it's not full of billions of musicians - so someone will introduce you to someone they know in China.

—**Sid Peacock**, composer and artistic director,
Surge Forward Music & Arts

3. Get support from trusted intermediaries

Cultural diplomacy bodies like the British Council, Arts Councils (England, Scotland, Wales, Northern Ireland), and industry bodies can offer vetted networks and funding information. They can help UK partners identify aligned collaborators in China and potentially test ideas in a supportive framework before branching out independently. Professional consultants and agencies who possess sector knowledge and networks in both the UK and China can be extremely valuable in facilitating partnerships and collaborations.

4. Navigate Censorship with local experts

Censorship is a reality in China. Rather than treating it as a barrier, it's worth demystifying this reality by listening to experienced Chinese partners who can offer grounded insight and contextual understanding. The key lies in knowing what's possible, when, and how to position content in ways that maintain both integrity and viability. Work with experienced local institutions who understand approval processes and can advise on how to frame content effectively.

“

If an institution is familiar enough with the censorship system, it's not necessarily a decisive obstacle. If the work contains political content related to China, it'll be subject to scrutiny—but not all political themes are off-limits. There's no manual for this system—you learn what's possible through relationships and experience. It's also not static but changing according to the shifting political climate.

—**Deputy Head of Exhibition**, a contemporary art centre
in Beijing, China

5. Start with exchange - not output

Prioritise small, trust-building collaboration before committing to full-scale productions. Modest, meaningful steps that allow both parties to “hang out in a pub” - figuratively or literally - create safer spaces for risk-free experimentation. This process of mutual listening and adaptation is a strength, not a delay. When successful, it lays the groundwork for deeper, more formal cooperation. Begin with residencies, workshops, or online training, especially those that enable informal, peer-level interactions.

“

It's actually good if the first bridge is small and manageable. It can be modest but there's already so much you're bridging!

—Joan Clevillé, Artistic Director, Scottish Dance Theatre

“

We need low-risk, non-commercial ways to build trust before we talk about outcomes.

—Andrew Lansley, Innovation Manager,
Cheltenham Festivals

“

When we go on tour, we always try to make it less transactional to create sharing opportunities - do a masterclass, warm up session to get local artists join, or do residencies without a direct outcome. The outcome is about exchange and learning in both directions.

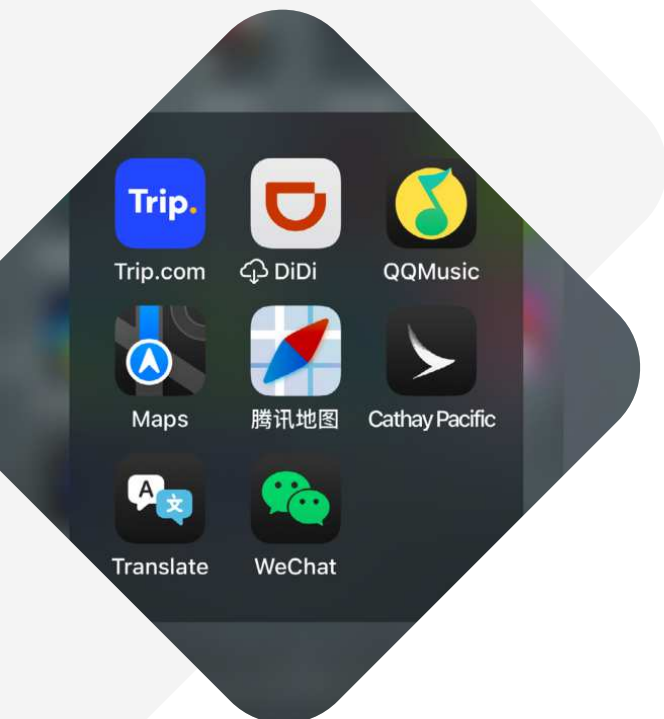
—Joan Clevillé, Artistic Director, Scottish Dance Theatre

6. Engage Chinese communities online

Platforms like RedNote (Xiaohongshu) and Bilibili are gateways to China's creative pulse—especially among youth. They transcend geopolitical restrictions and media headlines, and can be powerful entry points to observe trends, identify collaborators, relationship-building, and test resonance.

7. Use WeChat

China's professional communication often runs on WeChat: deals, logistics, and networking unfold via voice notes, group chats, and file sharing. While email remains in use, adapting to WeChat signals respect. WeChat now also has built-in English translation as well as voice note dictation, making it easy for international communication.



8. Use AI to navigate language barriers

AI tools like ChatGPT, DeepSeek or WeChat's built-in translation bridge language gaps. While picking up some basic Mandarin is useful, these tools enable smoother day-to-day communication and logistics.

“

In the UK, that might sound unprofessional, but in China, WeChat is the official way. That's also where you land a deal.

—Michelle Rocha, Head of Touring, Factory International

“

Without WeChat, you're not doing business.

—Sid Peacock, composer and artistic director, Surge Forward Music & Arts

“

I have my China folder for APPs on my phone and my computer - Apple Translate is perfect especially for taxi drivers and Trip.com is inclusive for everything.

—Andrew Lansley, Innovation Manager, Cheltenham Festivals

China's cultural policy overview

Understanding China's cultural governance structure

China's cultural governance operates through a hierarchical but increasingly adaptive model. The central government sets the strategic vision, while provincial and municipal governments interpret and implement national priorities based on local conditions. The chain of implementation is:

The State Council

→ Ministry of Culture and Tourism

→ Provincial Departments of Culture and Tourism

→ Municipal Departments of Culture and Tourism



The main instrument shaping policy direction is the national Five-Year Plans published by the State Council. First instituted in 1953, these plans embody the government's long-term vision for national progress. Each Five-Year plan is implemented alongside sector-specific national strategies as well as other sub-policies.

- **On a national level**, the current 14th Five-Year Plan (2021–2025) includes both general policy frameworks and specific cultural industry strategies, such as:
 - 14th Five-Year Plan for Cultural Development (State Council, 2022)⁶, which touches on the overall strategy in the cultural sector;
 - 14th Five-Year Plan for Cultural Industry Development (Ministry of Culture and Tourism, 2021)⁷, a more practical industrial policy focusing on nine different sectors.
- **Provinces and cities** would develop their localised cultural plans in line with national strategies based on local characteristics and development needs. For example, Beijing has Beijing 14th Five-Year Plan for Cultural and Tourism Development and Sichuan has the Sichuan 14th Five-Year Plan for Cultural Development and Reform.

(Note: this guide was written between February - May 2025, before the drafting of China's 15th Five-Year Plan (2026-2030) which is expected to be published during Two Sessions in March 2026. City-level plans under the new cycle are expected in 2027)

Key terms for the cultural policy landscape

These policy terms reflect the ideological framework shaping China's cultural priorities. Understanding them is key to building sensitive and sustainable collaborations.

- **Chinese-style modernisation (中国式现代化):** Similar to Socialism with Chinese Characteristics, this political slogan has been promoted by the CPC since 2021 to signify China's modernisation path rooted in its own values and narratives - not a replication of Western development models. It is a broad concept encompassing material, technological, and cultural aspects, signalling China's ambition for cultural independence and international discourse power.
- **New cultural productive forces (文化新质生产力):** Introduced in 2023, this term emphasises cultural production powered by technological innovation including artificial intelligence, big data, and cloud computing. The ultimate goal is to deliver enhanced cultural output in high-efficiency, highly-diversified and highly- personalised forms through deep integration of technology and culture.
- **Xi Jinping Thoughts on Culture (习近平文化思想):** Introduced in 2023, this framework underpins China's cultural development. It emphasises cultural confidence, openness, and the synthesis of traditional Chinese culture with socialist values. It has already catalysed increased investment in cultural industries, heritage preservation, and creative innovation, fostering a dynamic cultural sector.
- **Belt and Road Initiative (一带一路):** Launched in 2013, this global development strategy strengthens regional connectivity through infrastructure projects across Asia, Europe and Africa, embodying the ancient Silk Road's spirit of shared prosperity. It systematically promotes Eurasian cultural exchange via academic cooperation and grassroots initiatives, cultivating mutual understanding while elevating China's cultural influence.
- **Strengthening IP protection (知识产权强国):** In 2021, the Central Committee and the State Council issued the Outline for Building a Powerful IP Nation (2021–2035)⁸, along with the 14th Five-Year Plan for National IP Protection and Use⁹, laying out a top-level blueprint for China's IP development in the new era. The Outline aims to establish China as a world-leading IP powerhouse with a complete system, global competitiveness and high IP awareness. It highlights strategic pillars such as strengthening legal protection and the public service system, safeguarding emerging technologies and traditional knowledge, fostering IP markets and pro-IP culture, and engaging in global IP governance and international cooperation.

Practical policy trends for international cultural collaborations

Beyond slogans, these are more practical policy trends that will open new spaces for UK-China arts and cultural collaborations. It helps for international collaborations to reference and align with policy priorities.

1. Pilot to decentralise international performance approvals¹⁰

- **Key shift:** In July 2024, six cities (Shenyang, Nanjing, Hangzhou, Wuhan, Guangzhou, Chengdu) were authorised to directly approve performances involving foreign or Hong Kong/Macao/Taiwan investment.
- **Opportunities:** Pilot cities now serve as strategic entry points for UK touring or music exchange initiatives, offering faster processing and clearer routes to approval. This policy marks a key step in China's open-up in cultural policy after decades and extends the nation's invitation to high-quality international music and performing arts shows to come to China.

2. Cities branding through heritage and tourism

- **Key shift:** China is systematically developing distinctive city cultural brands under central policy guidance by leveraging their unique heritage in creative ways. E.g. Beijing's Jing Style Culture initiative revitalises traditional Beijing cultural elements like hutongs and Peking Opera; Shaanxi's Zhou-Qin-Han-Tang Culture transforms ancient dynastic heritage through immersive experiences like Datang Everbright City; Sichuan's Bashu Culture combines Sanxingdui archaeology with intangible heritage, creating over 70 themed tourism routes across the Chengdu-Chongqing Economic Corridor, supported by cross-provincial collaboration to build a trillion-yuan cultural tourism industry.
- **Opportunities:** When choosing Chinese cities for cultural exchanges, align with their city and cultural branding to improve project resonance and policy backing. Despite each city cultivating its unique brand, areas such as heritage modernisation and digital future alike remain shared directions for all cities.

3. Building a digital infrastructure for cultural heritage¹¹

- **Key shift:** China's comprehensive National Cultural Digitalisation Strategy aims to connect museums, libraries, and heritage sites through a unified data system by 2025 - blending online and offline service and fostering new formats like VR exhibitions and hybrid performances. By 2035, the system aims to offer global access to digital Chinese culture. Challenges like data security and copyright protection are addressed through specialised governance frameworks.
- **Opportunities:** Digitisation is the most active and well-resourced policy area. UK organisations with expertise in digital storytelling, curation, or preservation are well-positioned to partner on pilot projects or contribute to national platforms.

4. Reviving rural areas through arts and culture¹²

- **Key shift:** Culture is now central to China's rural development. The 2022 Opinions on Promoting Cultural Industries to Empower Rural Revitalisation¹³, jointly issued by six ministries, aims to develop cultural industries to activate heritage, foster local talent, and create integrated tourism models. Examples include Shanxi's mural villages and Guizhou's artisan cooperatives turning traditional skills into livelihoods. The government requires 63 pilot counties to test innovative models that combine arts with agriculture, supported by urban-rural partnerships and digital platforms.
- **Opportunities:** This policy encourages international artists to engage in rural arts and cultural initiatives. Collaborations combining arts with community regeneration or sustainability alongside the preservation, digitisation, and revitalisation of cultural heritage may receive strong local support. Latest examples in 2025 include a charity event co-hosted by Beijing's Zhaozhuangzi Village, the Mexican Embassy in China, and local media and charities¹⁴.

5. Building iconic heritage corridors into "National Cultural Parks"¹⁵

- **Key shift:** Launched in 2019, this policy reflects China's approach to preserving and showcasing its most significant linear heritage sites - the Great Wall, Grand Canal, Long March route, Yellow River, and Yangtze River. It blends heritage preservation with contemporary public engagement through four zones: protection, exhibition, tourism integration, and traditional use areas. Digital technologies like AI and 5G are used for creative public access and heritage protection. Notably, it adopts a "central coordination, local implementation" model across 30 provinces, blending international park management concepts with cultural storytelling twist.
- **Opportunities:** This policy encourages international organisations to participate in the derivative development of National Cultural Parks through film, gaming, performing arts and other creative industries. It specifically invites international teams to contribute to content creation and dissemination – as exemplified by the documentary *The Great Wall with Ash Dykes* (2023), which featured British adventurer Ash Dykes as its host.

Deep dive into art forms

How the below chapters are structured

The following five chapters offer a deep dive into China's major arts sectors:

- Performing arts
- Visual arts, cultural heritage and tourism
- Film
- Music
- Literature

This structure reflects both the British Council's strategic areas of engagement in China and the domains where UK–China collaboration holds the greatest potential.

To support both scanning and in-depth reading, each chapter follows a consistent format:

- **At a glance:** A one-page snapshot of market scale, key statistics, and immediate opportunities for UK partners
- **Market development timeline:** A concise history of how each sector evolved, highlighting key reforms, institutions, and turning points
- **Market overview:** A summary of current market dynamics, including size, structure, platforms and players
- **Key trends and opportunities:** Thematic insights drawn from stakeholder interviews and primary research, with clear opportunities and implications for UK practitioners
- **Case studies:** Examples of recent UK–China collaborations that illustrate different models, formats and entry points

This structure is designed to balance the broad scope, depth with accessibility—whether you're reading as a policymaker, producer, curator or cultural manager.



Performing arts

Performing arts in China at a glance

The performing arts sector in China is entering a **new phase of maturity and diversification**. After decades of infrastructure building and global engagement, the focus has shifted to **audience development** and **domestic content creation**.

Post-pandemic recovery has been swift and striking: 2024 marked **a record-breaking year for box office sales**, driven by large-scale concerts and festivals, experimental venues, and youth-oriented formats. Traditional performance formats like opera and dance now sit beside immersive theatre, hybrid events, and IP-driven musicals tailored to Chinese tastes.

Audiences are younger, more female, and more experience-focused than ever before. In major cities, theatre is not just art—it's leisure, entertainment, and lifestyle. Producers respond with data-led programming, local adaptations, and flexible business models.

- **£8.16 billion:** China's performing arts market size in 2024, up 39% from 2019
- **250%+:** Growth in small theatre attendance since 2019
- **72%:** Ticket holders aged 18–34; women make up two-thirds of total audience

Opportunities for UK partners

China's performing arts scene in 2025 is **energetic, multilayered, and accelerating**—but also commercially competitive and in search of wider industry maturity. By combining respect for China's rich cultural traditions with awareness of its rapid modernisation, international partners can find meaningful ways to contribute to and learn from this dynamic scene.

For small and medium UK performing arts professionals and organisations, the Chinese market offers both a potential audience of unprecedented scale and partners who are eager to exchange knowledge and repertoire. Whether it's a UK theatre group doing a Mandarin-subtitled run in China, a joint workshop between British and Chinese dancers, or a digital collaboration in the immersive space, the possibilities are expanding.

- **Opportunities to explore beyond touring.** Straight imports of UK shows to China now can face audience and budget barriers, given rising domestic productions. Co-creation, adaptation, and licensing are the future.
- **Opportunities to explore experimental spaces and scales:** Often more than flagship stages, China offers diverse and strong entry points through new, experimental, intimate venues, grassroots festivals, and immersive formats to reach its audiences.
- **Cultural fluency and localisation is key:** Offer content that aligns with local narratives or a universal appeal, rather than one-way exports.
- **Relationship building precedes results:** long-term collaborations thrive where trust, shared authorship, and curiosity are prioritised. China is a place where you can do business for a long-term view.

Market development timeline

1990s

Reform and Early Adaptation

Chinese theatre contacts with the West tentatively resumed after opening up. Most institutions are government-run but pilot programmes began to allow private investment and market competition.

- 1989** American director Arthur Miller was invited to Beijing to direct the Chinese *Death of a Salesman*.
- 1992** Guangdong Modern Dance Company was founded as China's first professional modern dance company.
- 1998** Disney's *Beauty and the Beast* was staged in Mandarin in Beijing, one of the first Western musicals presented in Chinese.
- 1998** Shanghai Grand Theatre opened, China's first modern performing arts centre.
- 1999** Shanghai launched the China Shanghai International Arts Festival as a state-level showcase of domestic and international performances.

2000s

Infrastructure Expansion and Global Engagement

The government invested heavily in cultural infrastructure. Private and foreign investment in the performing arts was explicitly encouraged. Chinese performing arts stepped up their global presence while foreign productions entered China in greater numbers - *The Phantom of the Opera*, *Cats*, *Lion King* etc.

- 2001** UNESCO recognised Kunqu Opera as a Masterpiece of Oral and Intangible Heritage.
- 2002** *Les Misérables* (English) was the first West End musical to tour China, breaking box office records.
- 2003** Poly Theatre Management Co was founded.
- 2004** *The Peony Pavilion* (youth edition) premiered and toured Mainland China, Hong Kong, Macao, Greece, the UK and the US.
- 2007** Beijing's National Centre for the Performing Arts (NCPA) opened as Asia's largest theatre complex, featuring multiple halls for opera, music and drama.
- 2008** Beijing Fringe Festival was founded.
- 2009** Online ticketing platform damai.cn was founded.
- 2010** Guangzhou Opera House opened (Zaha Hadid).

2010s

Diversification, Localisation, Festivals and Immersive Theatres

With the infrastructure in place, China's performing arts turned its attention to programming and audience development. This decade saw a musical theatre boom with a growing popularity of spoken drama led by renowned directors like Meng Jinghui. The UK-China golden era. The private sector became increasingly active with the rise of theatre festivals and international collaboration. By 2019, China's performing arts had truly diversified – encompassing traditional opera, modern drama, dance, musicals, experimental works, and large-scale spectacles – setting the stage for further growth (unaware of the coming disruption).

- 2011** *Mamma Mia!* First Mandarin production with a local cast at the Shanghai Grand Theatre, paving the way for many more Chinese adaptations of Western musicals.
- 2013** Wuzhen Theatre Festival was founded for avant-garde and international drama in Wuzhen, China.
- 2015** Multi-year partnership between Ambassadors Theatre Group and Poly Theatre Management.
- 2015** *The Phantom of the Opera* premiered in Shanghai, China.
- 2015** *War Horse* toured China in Beijing, Shanghai, and Guangzhou with National Theatre.
- 2016** The British immersive production *Sleep No More* by Punchdrunk opened in Shanghai in partnership with SMG Live, generating \$75M over 8 years and still running today.
- 2019** Domestic production *The Eternal Wave* premiered and toured China.

2020s

Digital Integration, Domestic Production, and Resume of International Connections

In response to the prolonged lockdown, Chinese performing arts organisations quickly innovated to stay connected with audiences online from Zoom calls to livestreaming. From the point Covid restrictions were lifted in 2023, the performing arts sector roared back to life with record-breaking box offices for large concerts and music festivals as well as a rising number of smaller alternative venues.

- 2020** Poly Cloud Theatre was launched to enable live streaming on WeChat and Weibo.
- 2021** Aranya Theatre Festival was founded.
- 2024** Temper Theatre's own production *HOME* toured six Chinese cities - Suzhou, Nanyang, Zhengzhou, Jiaxing, Shenzhen and Chengdu.

Market overview

Market size

China's performing arts industry reached **£8.16 billion (¥ 79.62 billion)** in 2024¹⁶, a **7.61% increase** compared to 2023 and a **39% above pre-pandemic levels**¹⁷.

The rebound has been fuelled by rising cultural consumption, policy support, the rise of domestic productions, and the return of international shows - making the sector a growing driver for both local tourism and broader cultural economy.

According to the China Association of Performing Arts, **the main artistic categories** in China's performing arts often include:

- drama theatre
- dance
- musical
- children's theatre
- music concert
- traditional opera
- folk vocal (including comedy)
- acrobatics

In 2023, China's performing arts box office was driven by folk vocal (including comedy), drama theatre, and children's theatre, each category exceeding £2 billion.

Musicals had the highest average spend per person, at around £34 (¥333.93) and dance followed at around £31 (¥308.67).

Audience demographics: Chinese performing arts audiences are rapidly growing and becoming more sophisticated. According to 2023 data, the audiences are:

- **Female-majority:** 67% of all attendees¹⁸
- **Young:** 72% of ticket holders are aged 18-34 (2023); 40% of the musical audience is below age 25.

Leading performing arts categories by box office in 2023

Types	Box office (billion ¥)	Attendees (million)	Average spend (¥)	Leading cities by box office
Folk vocal (inc. comedy)	29.88	1430.46	208.89	-
Drama theatre	28.52	1156.21	246.67	Beijing (30.8%); Shanghai (21.4%); Hangzhou (7.1%); Shenzhen (5.2%); Chengdu (4.0%)
Music concert	21.82	788.57	267.75	-
Children's theatre	20.55	894.93	229.68	Beijing (25.0%); Shanghai (18.8%); Shenzhen (5.6%); Chengdu (4.9%); Hangzhou (4.7%)
Dance	16.42	531.96	308.67	Beijing (27.9%); Shanghai (17.6%); Chengdu (6.7%); Hangzhou (5.5%); Nanjing (5.2%)
Musical	13.22	395.89	333.93	Shanghai (46.7%); Beijing (24.5%); Shenzhen (5.6%); Guangzhou (4.6%); Chengdu (3.9%)
Traditional opera	2.01	139.69	144.05	-
Acrobatics	1.6	110.08	145.35	-

Market segment

Performing arts venues in China (stadiums, theatres, live houses, and alternative spaces) can be broadly categorised as three major types below.

1. Professional theatre (500+ seats):

- Box office revenue (2023): ¥8.62 billion (↑ 14.21%)
- Audience: 30.6 million (↑ 34.5%)
- This was driven by an increase in venue availability alongside the growth of new domestic productions and the return of international performers.

2. Alternative theatre (< 500 seats, smaller productions in alternative spaces and smaller theatres):

- Box office revenue (2023): ¥ 4.8 billion (↑ 463%)
- Audience: 24 million (↑ 250%)
- These micro-venues have played a major role in incubating original works, nurturing creative teams, diversifying performance formats and growing audiences.

3. Large-scale concert and festivals (5,000+ attendees including theatre and music):

- Box office revenue (2023): ¥ 17.8 billion (↑ 348.98%)
- Audience: 27.89 million (↑ 239.17%)
- Mass live events have surged in popularity, especially among youth, with music festivals leading the growth.

Venues operating models in China often include:

- **Hosting theatres:** Most Chinese theatres fall into this category - primarily serve as rental spaces without in-house productions, relying on rentals and ticket sales. They operate commercially or with local government support. For example, Guangzhou Opera House operates as a self-financing cultural institution.
- **Resident + hosting theatres:** Less common, these venues maintain an in-house ensemble and repertoire alongside providing stages for external productions. The National Centre for the Performing Arts in Beijing is the most influential institution in this category.

Major industry players in China's performing arts sector include:

- **CPAA Theatres Group (China Performing Arts Agency Theatres Group)¹⁹:** a subsidiary of China Arts and Entertainment Group (CAEG) under the Ministry of Culture and Tourism, with 20 directly owned and managed theatres and 70 affiliated theatres in China. A key decision-maker for domestic and international programming as well as cultural diplomacy.
- **Beijing Poly Theatre Management Co., Ltd.²⁰:** China's largest theatre commercial network with 81 theatres across 23 provinces under direct management with integrated ticketing, touring and logistics supply chain. It's fully owned by China Poly Group Corporation, a state-owned business group.
- **AC Orange²¹:** the largest private performance enterprise in China and the first Chinese corporation investing in Broadway musicals. It specialises in musicals, IP licensing and localised Western musical productions (e.g. *Cats*, *Romeo & Juliet*).



Key trends and opportunities

This section distils insights from in-depth conversations with Chinese and UK performing arts professionals. These interviews reveal not a single ‘China model’ but a complex ecology defined by regions, scales, and institutional orientations. While conditions differ between Beijing, Shanghai, Guangzhou and beyond, several shared trends are emerging. These seven interlinked trends highlight how China’s performing arts landscape is evolving, and where UK stakeholders can engage meaningfully—through co-creation, adaptability, and long-term relationship-building.

1. From government-subsidised to mixed market operations

China’s performing arts sector is evolving from a state-dominated to a mixed model. While national and municipal troupes (major ensembles, opera groups, orchestras, dance troupes) still receive public funding, a large portion of performances are now market-driven—led by private companies or commercial arms of state-owned enterprises.

With commercial production on the rise, companies now compete to license international shows and develop original domestic IP. Big tech firms like Alibaba have entered the sector via ticketing and live event promotion, and sponsorship is increasingly common.

This differs from the UK model, where arms-length bodies like Arts Council England give grants to many arts organisations, and ticket sales and philanthropic fundraising fill the gap.

Opportunities: Collaborate across both public and private sectors: public troupes offer legitimacy and national reach, while commercial partners can bring agility, audience insights, and distribution muscle.

“

The theatre festival has always been supported by businesses and patrons along with some support from many international cultural associations. We need to be financially more considerate these couple of years - but the upside is that we now have experience, and audiences have changed - they’ve become more open! They used to only want to see big productions, but now they’re more willing to watch smaller, more experimental ones that they once rejected. This widens the range of performance we invite from abroad, allowing us to choose more contemporary pieces beyond traditional storytelling.

—LI Huayi (she/her), Curator and producer for multiple theatre festivals in China; Director of International Programme of the Aranya Theatre Festival



2. Small stages can have big impact

Despite commercial pressures, pockets of artistic risk-taking thrive in smaller theatres, curated festivals, and immersive spaces. Cities like Shanghai and Chengdu are hubs for format innovation, conceptual work, and genre hybrids. Private venues and patrons continue to invest despite running at a loss, motivated by a belief in theatre's transformative role. Projects like *Sleep No More* Shanghai and interactive horror shows demonstrate demand for experimental formats, especially among younger, urban audiences.

Opportunities: Innovation and experimental content can find its moment in China's performing arts if choosing the right stage. Use festivals (e.g. Aranya Theatre Festival) and smaller venues to pilot risk-taking work. Start small, adapt format, and partner with Chinese venues producers (e.g. Shanghai Dramatic Arts Centre, Tempest Projects) who specialise in curating and presenting contemporary content.

3. Highly audience centric content creation

Creative decisions are increasingly shaped by audience data, emotional preferences and social media engagement patterns. Female audiences aged 18-34 are the dominant demographic especially in urban areas. Shows are often programmed and marketed with this group in mind.

As theatre increasingly becomes a leisure choice, not just a cultural one. Audiences expect not just performance, but a curated night out - photo ops, merchandise, digital interactions, and post-show engagement. Each touchpoint contributes to audience satisfaction and the perceived value of the event. This trend is closely tied to the competitiveness among self-sustaining businesses mentioned above.

Opportunities: Work with partners with domestic audience insights to design how UK works can be meaningfully presented to Chinese audiences. Experienced and trusted China partners can help ground artistic integrity in China's market realities with local marketing and activation.



It's important to choose the right scale of stages. Some big stages can be risky for contemporary dance if there's little central subsidy that supports that risk.

—Joan Clevillé, Artistic Director, Scottish Dance Theatre



You need to find the appropriate scale that matches the scale you are interested in.

—Michelle Rocha, Head of Touring, Factory International



Now it's all about the (female) audience...The production itself might be straightforward but the holistic experience from online promotion to small gestures like signed photos or post-show stage door meet is part of the service that needs to be thoughtfully designed.

—Shihui Weng, Director and Founder, Tempest Projects

4. Theatre as leisure: framing art through everyday emotion

In China's fast-paced urban life, theatre is increasingly consumed as leisure—a break from work, a social activity, or an emotional outlet. While artistic ambition still matters, productions that speak to everyday experiences—love, anxiety, aspiration, family—tend to resonate more deeply than abstract or political themes. This framing doesn't diminish artistic value, but reflects an emphasis towards relatability and emotional immediacy in fast-paced everyday life.

Opportunities: Emphasise universal emotions over culturally unfamiliar content. Visually rich, emotionally accessible formats are more likely to resonate. Consider how a work might be framed around relatable human experiences, rather than relying on cultural or political references that may not translate easily.

5. The shift from export to collaboration

Audience expectations and production economics are making straight touring less favourable. There is a growing appetite for co-production, localisation, and licensed reinterpretation. Shows rooted on Chinese IP or created with local teams currently have far greater traction due to higher audience resonance, with domestic IPs like *Dream of the Red Chamber* or *The Eternal Wave* sell out instantly. The model of concept touring, where UK companies license a format or structure, and local teams deliver, offers a lower-cost and lower-carbon model. But it requires flexibility, trust and legal clarity.

Opportunities: Collaborate early and deeply. Co-creation opens space for smaller UK studios and companies to develop long-term partnerships and connect with China's growing, youthful theatre audiences—many of whom are now seeking contemporary, emotionally resonant work beyond classic imports.

“

Going to the theatre today can be more an offline entertainment than a cultural activity. Audiences are looking for instant gratification and having a good time.

—Shihui Weng, Director and Founder, Tempest Projects

“

What resonates most are stories grounded in everyday life and shared emotions.

—Li Huayi, (she/her), Curator and producer for multiple theatre festivals in China; Director of International Programme of the Aranya Theatre Festival

“

It's increasingly difficult to bring UK productions over exactly as-is. The future lies in co-creation

—Shihui Weng, Director and Founder, Tempest Projects

“

It's hard and rare to adapt the whole foreign play directly into the Chinese context, because many contemporary scripts are deeply rooted in the social realities of their own countries. The key challenge is: how can we translate those social reflections into something meaningful within the Chinese context?

—Li Huayi, (she/her), Curator and producer for multiple theatre festivals in China; Director of International Programme of the Aranya Theatre Festival

“

A lot of presenters want to use local casts. Sometimes it can be more efficient and sustainable to sell the concept, not the full production.

—Michelle Rocha, Head of Touring, Factory International



6. Build relationships first before proposals

In China (and potentially everywhere else), who you know often matters more than what you pitch. Successful collaboration relies on strong personal relationships, trusted intermediaries, and clear communication across cultural and organisational norms. Many UK–China projects succeed not through matchmaking but through slow trust-building and shared risk-taking. Misunderstandings around terminology, roles, and expectations are common. Intermediaries like bilingual producers and cultural consultants play a vital role in bridging gaps and maintaining momentum.

Opportunities: Invest in the relationship as an integral part of the creative exchange. Start with low-risk, exploratory work. Clarify shared goals early, and work with cross-cultural producers who understand both contexts.

“

You need that one person who can make the decision or who has the international perspective.

—Michelle Rocha, Head of Touring, Factory International

“

Never assume the basics... what we call a stage manager in the UK can mean something different in China.

—Michelle Rocha, Head of Touring, Factory International

“

It's not easy to listen actively, to negotiate when there are different needs in the room. But when that works, it is really powerful.

—Joan Clevillé, Artistic Director, Scottish Dance Theatre

“

I needed Sabrina [at Shanghai International Dance Center] to make the right connections. But I also needed Nelson, our international producer, to connect me to her.

—Joan Clevillé, Artistic Director, Scottish Dance Theatre

“

The greatest cost in collaboration is communication.

—Shihui Weng, Director and Founder, Tempest Projects



7. Technology awaits the artists

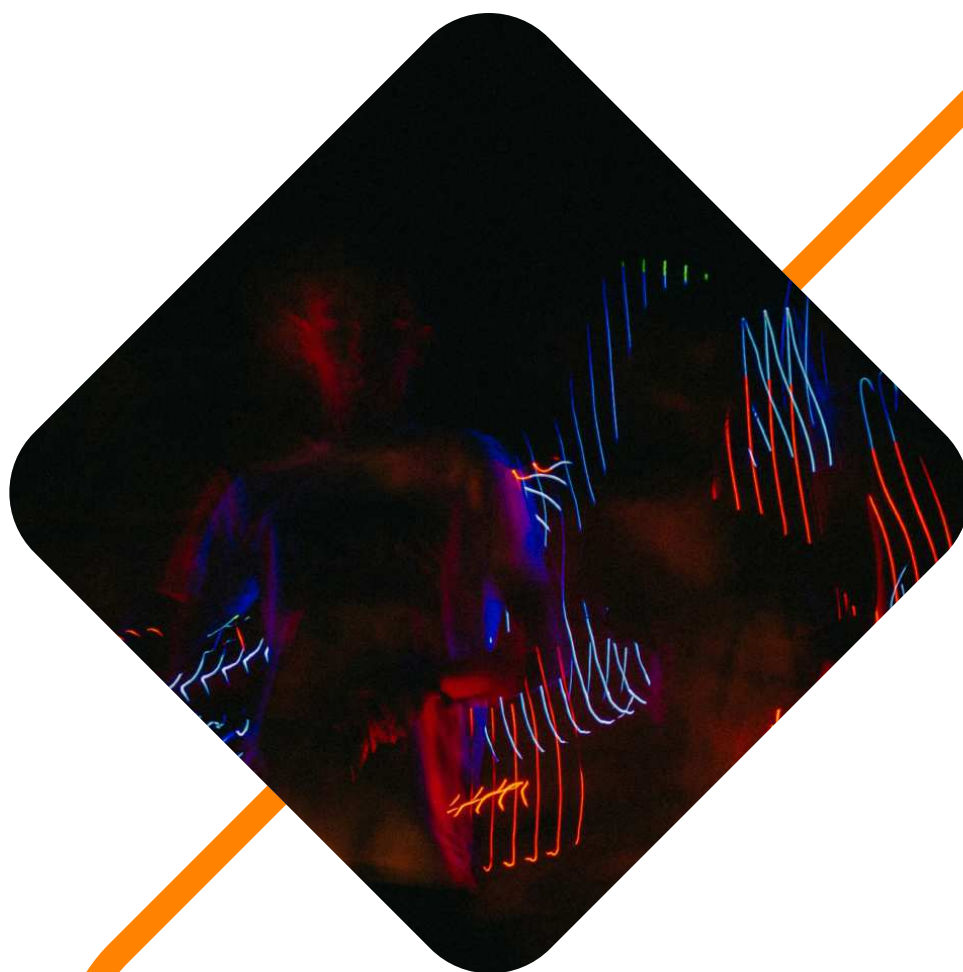
China has advanced infrastructure for immersive technologies such as motion tracking, but the integration into performing arts is still limited. Few institutions have dedicated capacity for digital experimentation, and artist-led innovation in this space is still emerging. However, China's tech-savvy populace and government interest in the digital creative economy mean this sector could expand quickly.

Opportunities: UK organisations experienced in digital performance, hybrid formats, or creative technology development are well-placed to share expertise. Joint R&D projects, research residencies, or tech-art incubators in partnership with Chinese creatives and tech platforms could open new collaborative ground.

“

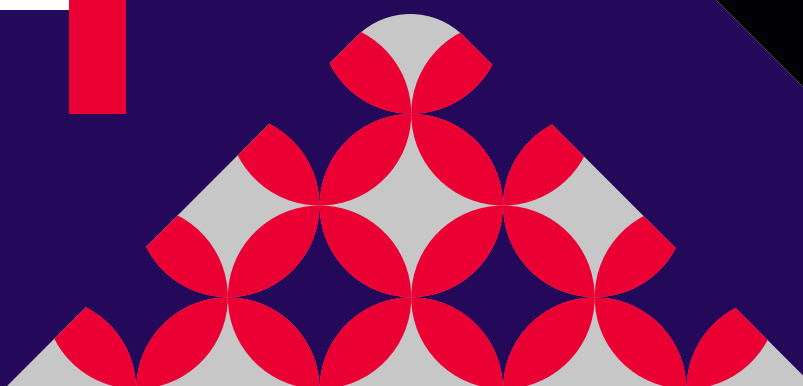
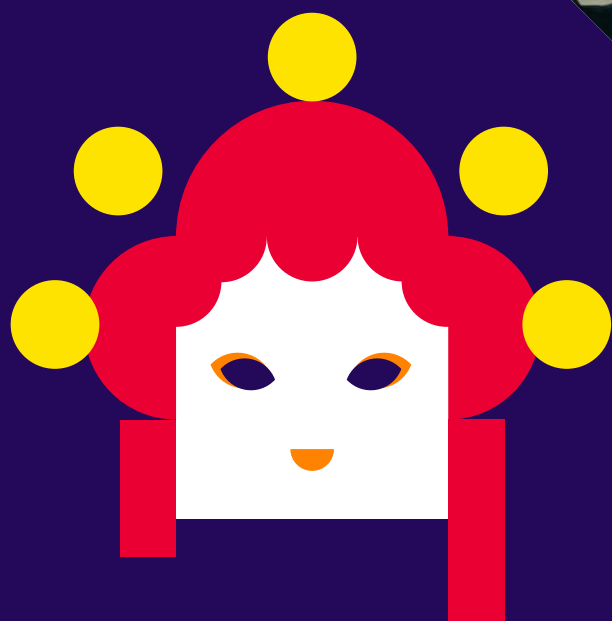
The technology is there — the challenge is that there aren't enough artists leading the way in exploring its creative potential.

—Shihui Weng, Director and Founder, Tempest Projects



Case studies

In this section we showcase a mini typology of UK-China collaborations in performing arts in the past few years. From touring to long-term co-production and R&D alliances, they demonstrate the scope, scale and creativity possible when UK and Chinese partners build relationships rooted in mutuality. These models are not mutually exclusive, many successful collaborations combine elements of several.



The China Tour of *HOME* by Temper Theatre, 2024

Partners: Temper Theatre × AC Orange
(supported by British Council and Arts Council England)

In June 2024, UK's Temper Theatre's own production *HOME* toured six Chinese cities - Suzhou, Nanyang, Zhengzhou, Jiaxing, Shenzhen and Chengdu - with 12 shows to over 3000 audiences and 60 workshop participants in 8 post-show discussions²². The director Finn Morrell was the Assistant Director for Rich Rusk on *Shan Hai Jing*²³, a co-production with Shanghai Dramatic Arts Centre in 2019. Built on pre-existing relationships, the tour blended performance and dialogue, offering Chinese audiences access to contemporary UK theatre and engaging in shared reflection. (images © Temper Theatre)



Three co-productions by Gecko Theatre × Shanghai Dramatic Arts Centre, 2016, 2019, 2025

Since 2016, Gecko Theatre has co-produced three shows with Shanghai Dramatic Arts Centre: *The Dreamer* (2016), *Shan Hai Jing* (2019), and *Metamorphosis* (2025). All were directed by Rich Rusk from Gecko Theatre and delivered with Chinese casts and creative teams. Each work interpreted classic texts (Shakespeare and Tangxianzu²⁴, Chinese mythology, Kafka) through bilingual rehearsal and shared authorship. This long-term partnership is a model of sustained cultural exchange and co-creation. (images © Shanghai Dramatic Arts Centre)



UK Spotlight at Aranya Theatre Festival's international programme, 2025, supported by British Council

The Aranya Theatre Festival is a leading experimental performing arts festival annually held in Qinhuangdao. It has become a gateway for international shows to enter China. The festival presented 29 plays in 2025, including 16 international works from 13 countries and regions²⁵. UK shows *L'Addition*, *The End* and *Puddles and Amazons* were selected.

L'Addition²⁶, directed by UK artist and writer Tim Etchells and performed by the performance duo Bert & Nasi, was an English version of the French production commissioned by Festival d'Avignon in 2023. The English version was part of the Edinburgh Fringe as a Here & Now showcase, where Aranya's programme curators discovered the show and decided to bring it to China.

The End²⁷ is another show by Bert & Nasi, commissioned by The Place and Warwick Arts Centre. Developed with support from the Banff Centre for Arts and Creativity. Supported by Arts Council England.



Puddles and Amazons²⁸ was part of the Made in Scotland Showcase 2024 at Edinburgh Fringe, which has been one of the most important platforms where Chinese producers go to invite shows back home. UK producers could connect with Chinese producers in international festivals in the UK as well as approach international festivals in China like Aranya to showcase works in China. This can potentially lead to collaborative curation for both countries, amplifying mutual global visibility and frosting cultural dialogues. (images © Aranya Theatre Festival)

The co-production of *Sanxingdui* musical, 2024

Partners: Chinese production team × Thom Southerland (director) × Morgan Large (designer)

The musical *Sanxingdui*, co-produced with UK director Thom Southerland and designer Morgan Large, recreated the ancient Shu Kingdom using cutting-edge stagecraft and traditional Chinese music. Alongside impressive results, the process surfaced opportunities to find best practices in co-producing culturally specific stories. The Chinese crew helping the international team understand nuanced historical elements, such as traditional Chinese rituals, underscored the value of early alignment and local consultations to maintain cultural authenticity. When forming an international co-production team for a Chinese story, it's important to prioritise Chinese leads in culturally or historically sensitive roles (e.g. choreography, stage design) while leveraging UK expertise in technical areas (e.g. lighting, design). (images © Guangzhou Opera House)



Sleep No More Shanghai by Punchdrunk, 2016 - ongoing

Partners: SMG Live

Co-produced by the UK's Punchdrunk and China's SMG Live, *Sleep No More Shanghai* has generated over ¥550 million since 2016, with 60% of attendees from outside Shanghai. Its immersive format redefined China's theatre landscape, blending Macbeth's narrative with site-specific staging in a 1930s hotel. The success illustrates the potential of IP adaptation models led by local teams. (images © SMG Live)



IIIE UK-Shanghai Consortium²⁹, 2023 - ongoing

Led by Goldsmiths, University of London, IIIE is a cross-sector consortium connecting UK and Shanghai-based creatives, researchers and funders to explore immersive and mixed-reality theatre through curated networking and investor showcases. The project supports early-stage development of concepts/IP surfaced by project partners in the creative tech space. (images © The Immersive Futures Lab)





Visual arts, cultural heritage and tourism

Visual arts, heritage and tourism in China at a glance

These three sectors are deeply interconnected in China and have grown at extraordinary speed. Cultural heritage and artistic output provide **core content for tourism** – for example, museum exhibits, heritage sites, and art festivals are major tourist attractions. Conversely, tourism brings funding and audiences to the arts and heritage sectors, encouraging the preservation of cultural sites and the operation of museums/galleries. Recognising this synergy, the Chinese government merged the Ministry of Culture and the National Tourism Administration in 2018 into the unified **Ministry of Culture and Tourism**, explicitly to “promote the integrated development of the cultural and tourism industries”. In practice, initiatives like “**culture + tourism**” demonstrate how a museum opening, an art biennale, or an intangible heritage festival can boost local tourism, and how tourist revenues can fund heritage protection and artistic development.

A nationwide museum boom has seen China surpass **7,000 registered museums** by 2024, with a powerful network of **galleries, private museums, and globally ambitious fairs** making China the world’s third largest art market by value. Additionally, the cultural retail sector, from museum gift shops to e-commerce IP collaborations, has become a major revenue driver. Post-pandemic, institutions face pressure to diversify income and build deeper audience relationships. Younger visitors are more critical, digitally savvy, and demand participatory formats.

- **7,046:** Museums registered in China in 2024
- **1.49 billion:** Museum visitors in 2024 (up 15.4% YoY)
- **£655 billion:** Value added of China’s broader cultural and related industries (2023)
- **15%:** China’s global share of the art market by sales value (2024)

Opportunities for UK partners

China’s visual arts and heritage sectors continue to grow in scale, complexity, and global ambition: less about rapid expansion, more about **depth, quality, and international dialogue**. For UK partners, success lies in **carefully chosen partnerships and long-term commitment**.

- **Collaborative curation beyond packaged exports.** Landmark exhibitions in the past showed the scale of impact possible. As China becomes more determined to elevate its own cultural heritage and influence, success for the future depends on sustained relationships, contextual relevance, and shared storytelling. Relevant themes like connections with the Silk Road, industrial heritage, design innovation and long-term loans with Chinese counterparts are great areas to explore.
- **Strategic alliance and knowledge sharing:** Chinese institutions, both public and private, are increasingly open to knowledge sharing around education, interpretation, and audience engagement. This isn’t about shipping exhibitions but shaping the institution and industry together.

- **Digital heritage is a growth area:** From VR tours of ancient villages to immersive storytelling at historic sites, China is investing in tech-enabled cultural preservation. UK creatives, researchers and technologists are well-placed to collaborate on digital formats, tools, and platforms.
- **Artist residencies and peer-to-peer collaboration build trust.** Informal exchange, research-led residencies, and bilingual curatorial partnerships can open long-term pathways beyond government-led MOU models.
- **Cultural retail offers crossover opportunities:** China is leading the cultural commercialisation from museum shops to brand collaborations. UK museums, design schools, and brands could explore IP partnerships that combine heritage with consumer design, as well as learning from China on the advanced ecosystem of cultural retail.

Market development timeline

1990s

Chinese Avant-garde Art

The beginning of the Chinese contemporary art market.

- 1994** There was only 1 museum in Shanghai: Shanghai Art Museum (f.1965).
- 1996** Shanghai Biennale was established.
- 1996** ShanghART Gallery opened by Swiss gallerist Lorenz Helbling.

2000s

Chinese Art Global Debut

Through the maturation of the market economy, the Chinese art market took off after the millennium.

- 2000** ShanghART became the first gallery from China to participate in Art Basel, marking the beginning of an increased global presence in the years to come.
- 2000** Shanghai Biennale turned from focusing on traditional art to contemporary art.
- 2000** Shanghai M50 Contemporary Art District.
- 2001** Chengdu Biennale was established.
- 2002** Guangzhou Triennial was established.
- 2003** Beijing 789 Art Zone became a developed artistic community.
- 2004** Shanghai Mingyuan Museum opened (private).
- 2005** MoCA Shanghai opened.
- 2006** Art-ba-ba BBS forum was founded.
- 2007** UCCA (Beijing) opened.
- 2007** Shanghai E-art Festival.

2010s

Explosive Growth Chinese Art Market Ecstasy

The 2010 Shanghai Expo was a milestone for China and its art industry, kicking off a decade of the most explosive growth. Driven by real estate development and the need for urbanisation, countless new establishments of large-scale, big-name-architect-designed, internationally-facing public museums, private museums, and art fairs emerged. New art districts were planned. Art retail flourished.

- 2010** Shanghai Rockbund Art Museum (RAM) opened.
- 2011** 'West Bund Culture Corridor' plan initiated.
- 2012** Long Museum Pudong opened.
- 2012** Power Station of Art (PSA) opened.
- 2013** The first Art Basel in Hong Kong took place.
- 2013** Art021 Art Fair was founded.
- 2014** West Bund Art & Design art fair was founded.
- 2014** Long Museum West Bund opened.
- 2014** Yuz Museum Shanghai opened (designed by Japanese architect Sou Fujimoto).
- 2014** K11 Art Mall held Master of Impressionism - Claude Monet in Shanghai (beginning of art retail heat).
- 2015** Shanghai Centre of Photography (SCoP) opened.
- 2016** the V&A and China Merchants Shekou Holdings (CMSK) jointly announced the launch of Design Society in Shenzhen.
- 2018** JINGART Art Fair was founded.
- 2018** Beijing Dangdai Art Fair was founded.
- 2019** Shanghai West Bund Museum opened.
- 2019** Tank Shanghai opened.
- 2019** West Bund Museum opened (David Chipperfield Architects). Its developer signed a 4-year partnership with Centre Pompidou.
- 2019** Tate signed a 3-year agreement with the state-owned developer Shanghai Lujiazui Group to be a strategic partner with the Shanghai Museum of Art Pudong (MAP).

2020s

Post-pandemic Recovery

The prolonged pandemic led to many closures of offline galleries and art spaces. While China's art market is recovering, new art spaces continue to launch and the visual arts industry continues to grow. Cultural development became an important part in governmental plans.

- 2020** China's Culture Power Strategy (2020-2035).
- 2021** M+ Hong Kong opened.
- 2021** Shanghai Museum of Art Pudong (MAP) opened (Designed by Atelier Jean Nouvel).
- 2022** China's 13th 5-year Cultural Development Plan.
- 2023** West Bund Art Area (西岸艺术示范区) was announced to be demolished, leading 17 art institutions to close or relocate.
- 2023** West Bund Museum and Centre Pompidou renewed a 5-year partnership (2024-2029).
- 2024** The first edition of ART021 Hong Kong.
- 2025** The Design Museum signed MoU with Shenzhen's Culture Square.

Market overview

Visual arts, heritage, and tourism are deeply interconnected in China.

- **Visual Arts** in China encompasses fine arts such as painting, sculpture, photography, calligraphy, and contemporary art, along with the institutions that showcase them (art galleries, art museums, and exhibitions). This sector includes both public museums and art academies (often state-funded) and private galleries and art fairs that promote artistic creation and the art market. It overlaps with China's broader "cultural industry," which has been growing into a significant economic pillar.
- **Cultural Heritage** refers to China's rich legacy of historical artefacts, monuments, traditions, and living expressions. It includes tangible heritage such as archaeological sites, historic buildings, relics in museums, and intangible heritage like traditional music, festivals, crafts, and performing arts. China has **56 UNESCO World Heritage Sites** as of 2023, second only to Italy, underscoring the global importance. Heritage resources are conserved under the National Cultural Heritage Administration and form the foundation for cultural education and tourism.
- **New legislation on restitution:** The 2024 revision of the Cultural Relics Protection Law³⁰ established a comprehensive "prevention, protection, utilisation, accountability" institutional framework that came into effect from 1 March 2025, marking China's transition from reactive to proactive conservation in cultural heritage safeguarding. The revised law strengthens China's commitment to international collaboration with mutual benefits in the fields of archaeology, restoration, and the repatriation of cultural relics. Meanwhile, it sets out increased regulations on international loans and cross-border movements, especially for graded cultural relics.

- **Cultural tourism** is a key segment in tourism focused on cultural experiences – visiting museums, galleries, heritage sites, festivals, and other cultural attractions.

Market size

- China is undergoing a full-scale **museum boom**. In 2024, China had **7,046 registered museums**³¹ - up 213 from 2023. That's the equivalent to having a new museum opened every less than two days since 2012³². In 2024, a total of 43,000+ exhibitions (up 1.53%) and 510,000+ educational events (up 33.57%) were held.
- The rise in museums also sees surging attendance. China recorded **1.49 billion museum visits** (+ 15.4% from 2023) in 2024.
- **Museum retail:** While most museums are free to enter (91.5%)³³ Many have creative gift shops and cultural product lines that generate revenue. In 2024, museum retail in China generated around **£351 million** (¥3.428 billion), up 63.7% from 2023.
- **Commercial art market:** is the third-largest art market in the world, accounting for **15% of global sales** value in 2024 (Art Basel & UBS)³⁴.



Market segment

China's visual arts ecosystem is anchored by a mix of state-led institutions and a commercial art market.

- **Public museums** hold national collections and drive research, exhibitions, and public education. They are increasingly serving as social and tourist destinations, not just scholarly spaces.
- **Private museums and art galleries**, often founded by collectors or corporations with no public subsidy, play a major role in showcasing contemporary art. Flagship examples include the Long Museum(Shanghai), Yuz Museum (Shanghai), Today Art Museum (Beijing), UCCA (Beijing) and the He Art Museum (Foshan).³⁵
- **Auction house, art fairs, and art districts:** provide global networks that facilitate exhibition and sales of visual arts. Art clusters like 798 Art Zone in Beijing and M50 in Shanghai, domestic and international auction houses like Poly Auction, Christie's, Sotheby's and Philips, and art fairs like ART021, Westbund Art & Design, Photofairs Shanghai are key to international exchange.
- **Art festivals and major events:** China's flagship art biennales like Shanghai Biennale, Guangzhou Triennial and Chengdu Biennale are nationally significant art festivals and strategic touchpoints for international collaborations. Usually backed by strong local government support, they offer platforms for emerging and established Chinese curators and artists as well as attract and feature global curators and artists.
- **Cultural retail** is booming. Museum shops, branded merchandise, and IP licensing turn heritage into consumer goods—sold online via platforms like Taobao, Douyin and WeChat.
- **Exhibition touring and logistics** are shaped by a mix of state-affiliated and private agencies. For example, Art Exhibitions China (AEC), under National Cultural Heritage Administration worked with V&A for a few touring exhibitions³⁶. Youxiang Art Exhibitions facilitated the 4-city China tour for National Museum Liverpool³⁷. Eric Art Services is a fine art handler providing logistics, storage and other services with extensive portfolio in China³⁸.



Key trends and opportunities

This section distils insights from in-depth conversations with Chinese and UK visual arts professionals. These interviews reveal four critical shifts that reflect an environment that is increasingly diversified, resilient, digitally advanced, and receptive to collaboration. These four interlinked trends highlight how China's visual arts, cultural heritage and tourism landscape is evolving, and where UK stakeholders can engage meaningfully—through strategic alliance, shared learning and long-term relationship building.

1. Institutions' increasing need for financial sustainability

Government policies and funding environments have a massive impact on international collaborations. After decades of infrastructure-led expansion that relies on governmental support and private investment, many museum and art institutions in China now have an increasing need to take responsibility for financial sustainability. Government support remains important, yet is increasingly diverted to the few major players and other priorities. Touring exhibitions, venue hire, and education programmes now sit alongside ticket sales and membership programmes as core sources of income.

Although some large art districts and arts spaces have closed or downsized post-pandemic, new ones are still emerging and others are working to consolidate and build a more robust and globally connected sector. Multi-year, high-profile partnerships such as those between the V&A and Design Society in Shenzhen or Tate and Museum of Art Pudong have helped lay the groundwork for a more diverse ecosystem. The sector is extremely dynamic and looking to raise standards in curatorial practice, audience engagement, and financial sustainability, which is where the next phase of opportunities lies.

Opportunities: UK organisations should approach collaborations with an awareness of the partner's financial model and distinguish structural challenges and practical challenges. Projects that allow flexibility around outcomes and support the long-term development of both parties are more likely to gain traction.



With the current economy in China and globally, very few museums and galleries could survive just on ticket sales unless they might be receiving direct funding from the government. Most institutions are juggling private patrons, sponsorship, educational programmes and retail etc.

—Deputy Head of Exhibition, a contemporary art centre in Beijing



2. Peer-to-peer exchange is always a good place to start

While top-down government-level institutional partnerships remain a core feature of the UK-China cultural landscape, there is growing momentum behind more fluid, artist- or curator-led exchanges. Informal networks, long-term residencies, and research-led formats that foster mutual understanding provide valuable opportunities for seeding larger scale outputs.

Opportunities: UK organisations and practitioners can look for low-pressure, dialogue-based opportunities like residencies, online talks, workshops, research exchange, and curatorial pairing. Matching intentions and scale—whether working at a grassroots, institutional, or governmental level—can lead to more effective and rewarding outcomes for both sides.

3. Maturing audiences demand quality and meaning

After a decade of rapid museum growth and blockbuster exhibitions, Chinese audiences are becoming more discerning and confident in their cultural choices. Visitors now expect value, meaning, and engagement—not just spectacle—and are more willing to participate actively in shaping and critiquing cultural experiences. There's a growing appetite for contextualised content, especially among younger audiences and cultural professionals outside of first-tier cities.

Opportunities: the maturing audiences in China presents a widening range of opportunities for UK stakeholders to offer more diverse content, programmes, and elements that don't necessarily rely on cultural framing.

“

It's not about how many exhibitions you produce but the cultural exchanges – the WhatsApp group was set up during Manchester International Festival two years ago, and it's still active. Artists organically started to create connections. It's about creating the right circumstances—a greenhouse environment—for people to thrive.

—Director of a contemporary art gallery in the UK



4. Heritage goes digital: culture preservation meets creative tech

The pandemic accelerated digitisation - from online exhibitions, 3D virtual tours, to online auction sales. Digitisation has also become a strategic tool for preserving and promoting China's vast cultural heritage, particularly in rural and historically underrepresented areas. Initiatives such as the Traditional Chinese Village Digital Museum³⁹, launched in 2017, have built comprehensive digital catalogues of over 6,800 villages, combining oral histories, 3D modelling, and VR/AR experiences. Provincial governments, universities, and museums are all investing in heritage-tech partnerships—showcasing everything from temple murals and folk architecture to craft practices and ecological knowledge.

Opportunities: UK creatives, technologists and heritage institutions are well-positioned to collaborate on digital storytelling, immersive experiences, and cross-border research with China's counterparts. A UK-China hackathon on museum digital engagement or a joint online exhibition on a VR platform are examples of contemporary collaboration.



Case studies

In this section we showcase a mini typology of UK-China collaborations in visual arts, cultural heritage and tourism in the past few years. From gov-to-gov strategic partnership, touring exhibition, artist residencies to R&D alliances, they demonstrate the scope, scale and creativity possible when UK and Chinese partners build relationships rooted in mutuality. These models are not mutually exclusive, many successful collaborations combine elements of several.



Multi-year strategic partnerships between high-profile museums

- V&A x China Merchants Shekou (CMSK): Design Society, Shenzhen
- Tate x Lujiazui Group: Museum of Art Pudong, Shanghai
- Science Museum x Palace Museum: Time, Culture, and Identity
- The British Museum x Suzhou Museum, Suzhou

These high-level, multi-year partnerships have enabled UK museums to share curatorial expertise, develop exhibitions, train museum staff, and support the launch and growth of new cultural institutions across China. The V&A's role in co-founding Design Society in Shenzhen in 2014 set a precedent for subsequent collaborations. Such partnerships are win-win: Chinese museums gain content and operational know-how, while UK institutions extend their global presence and often secure financial return.

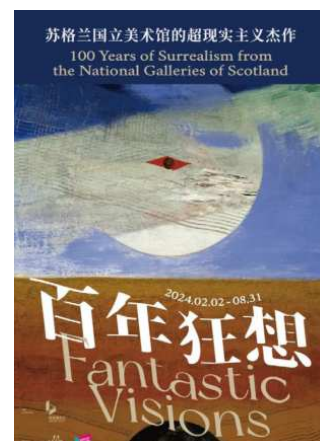
The Design Museum x Shenzhen Culture Square⁴⁰, 2025

In March 2025, the Design Museum signed Memorandum of Understanding with Shenzhen's 188,000 sm² cultural landmark, Shenzhen Culture Square, to be its strategic cultural partner, alongside another two French museum partners (Musée des Arts Décoratifs and Manufacture Nationale de Sèvres of France). The Collaboration begins with the touring exhibition *A Century of Chairs* and will explore cultural IP development, social participation models and modernised Chinese design. (images © Shenzhen Culture Square)



National Galleries of Scotland x Museum of Art Pudong *Fantastic Visions: 100 Years of Surrealism from the National Galleries of Scotland exhibition*⁴¹, Feb - Aug 2024

Produced by Shanghai Lujiazui Development (Group) Co., Ltd., and co-organised by the Museum of Art Pudong and the National Galleries of Scotland, this exhibition drawn entirely from the collection of the National Galleries of Scotland, contains over 100 major works by over 50 artists, including some of the world's most important surrealists like Salvador Dalí, René Magritte, Max Ernst, Joan Miró, Leonora Carrington, and Dorothea Tanning. All the artworks on display, ranging from painting, sculpture, frottage, collage, photography, manuscripts, and books, are presented in China for the first time. (images © Museum of Art Pudong)



National Museums Liverpool's bilateral touring exhibitions, 2018 - ongoing

The landmark touring exhibition *China's First Emperor and the Terracotta Warriors* (2018), co-organised by the Shaanxi Provincial Cultural Relics Bureau and National Museums Liverpool attracted over 600,000 visitors and £78 million in local economic impact⁴². It catalysed ongoing partnerships and allowed National Museums Liverpool access to the museum network in China, leading to additional recent touring exhibitions like *Art in the Age of Victoria* (2023-24) and *The Greek and Roman Gods* (2024-26). UK institutions could explore co-curation of exhibitions around shared themes, e.g. Silk Road connections, industrial heritage, design innovation and long-term loans with Chinese counterparts. (Images © Mr. Ziyu Qiu licensed under [National Museums Liverpool](#))



Digital Heritage Nanjing Hackathon 2024⁴³

Partner: UNESCO x Nanjing Cultural Investment Holding Group

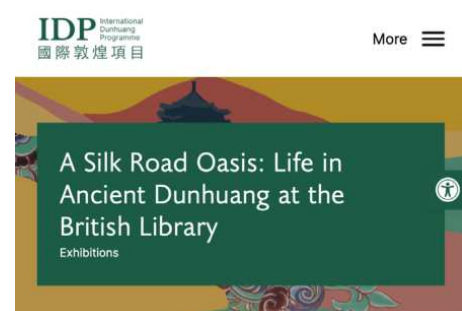
Held on July 2-8th, 2024, this event was the world's first museum immersive hackathon that invited young people to reimagine visitor experience at a historic site - Great Bao'en Temple Ruins Museum in Nanjing. Of 588 submissions, 15 finalist teams participated—including graduates from UCL, Bristol, and Goldsmiths. Judges included UK professionals. This initiative exemplifies how museums and digital technology can work together to bridge heritage and contemporary audiences. The contest not only revitalises interest in the Great Bao'en Temple but also encourages preserving and promoting cultural heritage through international collaboration and innovation. (images © Nanjing Cultural Investment Holding Group)



IDP International Dunhuang Project⁴⁴, 1994 - ongoing

Partners: British Library × National Library of China × Dunhuang Academy × multiple international libraries and museums

One of the longest-running, most mature UK–China research collaborations in cultural heritage. The project currently links 35 partners worldwide forming a growing network of libraries, museums and research institutes. It digitised manuscripts and artefacts from the Silk Road's Dunhuang site. In 2025, the British Library hosted a major exhibition, *A Silk Road Oasis*⁴⁵ exhibition and academic symposium⁴⁶. A leading example of scholarly, technical, and diplomatic exchange. (images © British Library)



Artist residencies and exchanges

There are many opportunities for residency and peer-to-peer exchanges between the UK and China. This includes funding for UK professionals to undertake residencies in China and supporting Chinese artists to go to UK residencies. Arts Council England and British Council in the UK have enabled dozens of professionals and artistic dialogue between China and the UK, meanwhile there are many artist residency opportunities enabled by Chinese organisations such as:

- Beijing Inside-Out Museum:
<https://www.ioam.org.cn/zhu-liu/>
- Shanghai The Swatch Art Peace Hotel artist residency:
<https://www.swatch-art-peace-hotel.com/artist-residency>
- Hangzhou BY ART MATTERS:
<https://www.byartmatters.com/residency>
- Chengdu A4 ART MUSEUM:
<https://www.a4artmuseum.com/en/a4-residencyartcenter/about-residency/>
- Chengdu NY20+:
<http://www.ny20plus.com/en/h-col-112.html>
- Xiamen C-Platform art residency:
<https://www.c-platform.org/event/lucitopia-residency-2021-2022/>
- Xiamen Chinese European Art Centre:
<https://www.ceac99.org/residency/>
- Zhujiyajiao Acentric Space:
<http://www.acentricspace.com/residency/>



Film

Film in China at a glance

China's film industry is vast and navigating a complex global moment. With over 90,000 cinema screens and a box office nearly six times the size of the UK's, China is the world's second-largest film market. While blockbuster imports face tighter access and diminished dominance, domestic films now account for over 85% of box office sales. Meanwhile, art-house cinema, streaming platforms, and film festivals offer promising—less complex—routes for international engagement.

- **42.5 billion yuan**(~£4.41 billion): China's 2024 box office
- **1.01 billion**: Total cinema visits in 2024
- **90,968**: Number of cinema screens in China—more than any country in the world
- **85%+**: Share of domestic films in the Chinese box office

Opportunities for UK partners

For UK stakeholders, film remains one of the most regulated and challenging sectors to navigate, but also one of the most creative, dynamic, and digitally integrated. While formal co-productions remain underused, appetite is growing for distinct British voices, new formats, and skills exchange. China is also strengthening its IP protection in the film sector with tightening enforcement and clarifying legal interpretation, aligning with its broader IP strategy and international commitments. The path forward lies not in one-off sales, but in building long-term relationships through collaboration, capacity-building, and reciprocal visibility.

- **Clarify British distinctiveness**: with large-budget foreign blockbusters increasingly restricted by tighter funding and policy volatility, arthouse cinema in China are on the rise. Actively distinguishing UK cinema from Hollywood with its unique strength in its screenwriting, emotional realism and storytelling craft would help find its contemporary voice in the China market.
- **Leverage festivals and reciprocal screenings**: Film festivals offer soft-entry strategic routes into China. Partner with UK entities already active in China or with experience in reciprocal programming. Support outbound Chinese screenings in the UK to build diplomatic reciprocity and unlock local permissions.
- **Explore digital pathways**: Online platforms and restoration projects can reach audiences and bypass some traditional barriers.
- **Start small, build trust**: Co-productions work best when preceded by joint development, peer exchange, and shared authorship. Using skills-based collaboration as an entry such as training in screenwriting, film preservation, special effects (VFX), or post-production can create value and forge partnerships. Film archiving and restoration are emerging fields of bilateral interest—jointly restoring a historical film for exhibition in both countries would combine technical exchange with cultural diplomacy.

Market development timeline

1990s

Market Reform and Introduction to Hollywood

The 1990s marked a commercial turn with the emergence of private distributors and studios. The introduction of revenue-sharing Hollywood imports reshaped box office dynamics. China began building bridges to the international market while keeping firm policy oversight.

- 1992** China Golden Rooster & Hundred Flowers Film Festival was founded.
- 1993** Studios were allowed to distribute their films, breaking the state monopoly.
- 1993** Shanghai International Film Festival was established.
- 1994** The Fugitive became the first revenue-sharing Hollywood film released in China.
- 1995** Surge in foreign film imports (*Forrest Gump*, *The Lion King*) drove 50–80% box office growth.
- 1997** Return of Hong Kong to China fuels growth in mainland-HK co-productions.
- 1999** China Film Group Corporation (CFGC) was established.
- 1999** Bona Film Group was founded, the first private firm with a national distribution licence.

2000s

Urban Cinema Boom and Commercialisation

The 2000s decade was defined by rapid commercialisation and growth. China's accession to the WTO in 2001 and the domestic economic boom fuelled investments in cinemas, studios, and new film companies. The industry shifted from a state-subsidised model to a market-driven ecosystem producing both artistic films and big-budget blockbusters. Key developments included an explosion of multiplex cinemas, the rise of private studios, new genres, and the first Chinese films making a mark globally in the modern era.

- 2001** China joins WTO.
- 2002** *Hero* by Zhang Yimou topped international box office as a foreign film backed by Miramax.
- 2004** *House of Flying Daggers* showcased China's visual storytelling globally backed by Warner Bros. 20th Century Studios etc.
- 2006** China Film Archive launched Film Archive Digitisation and Restoration Project.
- 2006** FIRST International Film Festival was founded, focusing on platforming emerging filmmakers.
- 2008** Cinema screen count tripled since 2003 from 1500 to 6000+.
- 2010** China produced 500 films annually as the 3rd largest film industry by output.

2010s

Explosive Growth, Online Streaming and Global Ambitions

Powered by a fast-growing middle class and aggressive cinema expansion, China's box office skyrocketed, making it the second-largest (and at times the largest) film market in the world. This decade saw Chinese studios deepening integration and competition with Hollywood as well as the rise of online streaming platforms.

- 2011** Beijing International Film Festival was founded.
- 2012** China's film import quota increased from 20 to 34.
- 2012** Maoyan, online ticketing APP, set up by Meituan Group.
- 2013** 4G Internet rolled out; Mobile overtook PC in China.
- 2013** China became the 2nd largest film market globally by box office.
- 2014** UK-China film co-production treaty was signed, allowing co-produced films to qualify as domestic in both countries and bypassing import quotas in China and tax benefits in the UK.
- 2016** Explosive growth of short-form video platforms and livestream. Platforms like iQiyi, Tencent Video and Youku started producing original films and web movies.
- 2016** Nationwide Alliance of Arthouse Cinemas (NACC) was founded.
- 2017** *The Foreigner* (Jackie Chan and Pierce Brosnan) was released as a UK-China-US co-production.
- 2017** Film Industry Promotion Law took effect to promote domestic filmmakers and ideologically aligned content.
- 2017** Pingyao International Film Festival was founded.
- 2017** Domestic film *Wolf Warrior 2* became China's highest-grossing film then, earning \$870M.
- 2018** The film regulatory authority (then SAPPRFT) reorganised. Film censorship and approval put directly under the Party's Central Propaganda Department.
- 2019** Domestic film *The Wandering Earth* earned \$700M.
- 2019** 5G rolled out.

2020s

Film Restoration, Regulatory Tightening, Resilience

With COVID disruption, tightening regulations and shifting global dynamics, the 2020s Chinese film industry has been characterised by domestic productions, growing streaming distributions, and internet mini-films.

- 2023** China's box office accounted for 28% of global revenue with over 85% from domestic films.
- 2023** Launch of Classic Hong Kong Film Restoration Project by China Film Archive, Douyin and Volcano Engine
- 2023** 1st International Restored Film Festival.

Market overview

Market size

China retained its position as the **world's second-largest film market** in 2024, demonstrating a steady upward trajectory⁴⁷.

- **Box office:** In 2024, China's box office was 42.5 billion yuan (~£4.41 billion), with over 1.01 billion cinema visits⁴⁸. By contrast, the UK/Ireland box office for 2024 was around £979 million, which is about one-fifth of China's revenue.
- Over **85%** of China's box office in 2023 came from domestic Chinese films, with a few overseas breakthroughs like *Wolf Warrior 2* (~\$2.7 million in the US) or *Ne Zha* (~\$3 million in North America) – tiny compared to their home totals. The record-setting box office run of *Ne Zha 2* grossed \$60 million overseas, yet still only 3% of its \$2.15 billion domestic box office⁴⁹. On the other hand, UK films earned £402 million at the UK box office⁵⁰ and grossed \$6 billion worldwide with global audiences⁵¹. This highlights the currently inward-focused Chinese film industry signals opportunity to open up China's film market.

Market segment

Infrastructure-wise, China had more than **90,968 cinema screens** in 2024, the most in the world. Cinema has penetrated far beyond urban centres, with multiplexes now commonplace in smaller cities and towns. Cinema penetration went from <1 screen per 100,000 people in the 1990s to about 6 screens per 100,000 by 2020, matching or exceeding UK ratios (7–8 screens per 100,000 people).

In terms of key players, major state-owned firms like China Film Group and Shanghai Film Group continue to dominate, alongside media-tech giants like Tencent Pictures, Alibaba Pictures, Enlight Media, and iQIYI Pictures, which leverage digital ecosystems to finance and distribute films. Private studios like Wanda Media also play key roles, with Wanda's acquisition of AMC making it the world's largest cinema chain.

- **Domestic production vs. foreign import:** The government maintains an **import quota** of foreign revenue-sharing films per year since 2012, however, as the market becomes increasingly open, the actual number of imported films has exceeded this quota, making it largely symbolic. On 9th July 2025, a national meeting⁵² on imported film distribution was held in Beijing, signalling stronger support for international cooperation and a more balanced approach to both domestic and foreign films. This meeting highlighted a more welcoming environment for high-quality imported films.

Although US movies no longer dominate the Chinese box office, they still managed to earn \$585M in 2024, which is no small sum but only 3.5% of the Chinese box office⁵³. Amid ongoing China-US trade war, Hollywood productions continue to face mounting competition and political headwinds. As of writing, the Chinese Film Administration (CFA) said on 11 April 2025 that it will cut the number of US film imports. Historically, many UK films have entered China as US films due to American financial backing. In the current climate, however, there is growing space for non-US backed films, creating new opportunities for independent UK productions and other international titles financed outside the Hollywood system.



- **Art house cinema:** Nationwide Alliance of Arthouse Cinemas (NACC) was founded in 2016 to promote arthouse cinemas, now with over 2,937 cinemas (2023). It operates under China Film Archive and China Film Art Research Centre, and organises international film screenings across its affiliated cinemas⁵⁴. Shanghai Art Film Federation has also been a long promoter of arthouse cinema long before Beijing.
- **Film festivals:** China hosts a vibrant array of film festivals that showcase independent and arthouse cinema, ranging from top-tier government-run international festivals to smaller indie gatherings. Shanghai International Film Festival (SIFF)⁵⁵ is a key state-run festival, having led the Belt and Road Film Festival Alliance that links 50+ international festivals for cultural exchange. Beijing International Film Festival (BJIFF)⁵⁶ is the capital's premier film event, co-hosted by the China Film Administration and Beijing government. FIRST International Film Festival⁵⁷ in Xining has evolved into China's festival for young and independent filmmakers. Other specialised festivals include: West Lake International Documentary Festival⁵⁸, Beijing Queer Film Festival⁵⁹ and many more.
- **Film-related IP protections:** In 2023, in the context of developing the film industry as a key part of China's soft power strategy, China's Supreme People's Court published eight landmark cases on film-related intellectual property (IP) protection, illustrating how courts are strengthening IP protection in the film sector. These cases span criminal and civil matters, covering issues such as:
 - Cinema piracy (unauthorised filming and distribution of theatrical releases)
 - Online copyright infringement
 - Moral and adaptation rights
 - Fair use and accessibility
 - Commercial secrecy during post-production
 - Unfair competition via misleading publicity

These rulings send a clear signal that China is tightening enforcement and clarifying legal interpretation in the cultural IP space, aligning with its broader IP strategy and international commitments. For UK-China cooperation in film, these precedents offer a more structured legal environment—especially relevant for co-productions, licensing, and brand protection.



Key trends and opportunities

This section distils insights from in-depth conversations with Chinese and UK film professionals. These interviews reveal five trends that reflect China's changing environment in co-production, distribution, film festivals in China and offer targeted opportunities for UK stakeholders where mutual value, skill-sharing and long-term trust are prioritised.

1. Distribution remains the greatest hurdle for UK films

Access to China's distribution network is tightly controlled. Every film requires a "dragon label" approval, whether for cinema, streaming or festival screening. French and German films often have an advantage to gain faster approvals due to longstanding cultural diplomacy frameworks. In contrast, UK film remains in a grey area post-Brexit and following recent geopolitical tensions. Local distributors take on financial risk and are cautious unless political and commercial prospects are clear.

Both the UK and China are experiencing the impact of streaming. In the UK, cinema attendance faces headwinds from the convenience of at-home streaming services. In China, streaming (via domestic platforms like Tencent Video, iQiyi) is also popular, but going to the cinema remains a strongly embedded social activity, especially for young people. Short video mobile platforms such as Douyin and Kuaishou also compete for attention, but Chinese cinemas have combated this by enhancing the cinema experience through luxury seats, themed events, food and beverage services, etc.

While online streaming platforms like iQiyi and Tencent offer alternate distribution channels, they still require approval by China's broadcast authority, now housed within the Central Publicity Department. Online distribution can be less bureaucratic than theatrical release, but it remains time-intensive for UK producers unfamiliar with the system.

Opportunities: Secure a trusted Chinese distributor early—ideally one with experience navigating the quota and approval system. Where this isn't viable, explore festival circuits or curated streaming partnerships.

“

If the Chinese company buys UK rights and the film doesn't get approved, they lose money—and confidence. That's why people hesitate.

The Chinese film market is the most exciting in the world—but also the most challenging.

— **Dr. Hiu Man Chan**, Senior Lecturer in Creative Industries, De Montfort University, Founder of UK-China Film Collab (NGO)

2. Co-production: an underused route

The 2014 UK–China co-production treaty enables films to qualify as domestic in both countries. But uptake remains low, hindered by regulatory complexity, creative misalignment, and lack of early trust-building. UK filmmakers often pitch ideas “about China” without truly understanding local narratives or audience expectations.

The treaty remains in place to allow bypassing quotas and easing distribution. If the right partnership and right type of content are in place, this is a great route to enter the China film market.

Opportunities: this route is suitable for UK stakeholders who are open to developing co-production, might it be through shared research, joint script development, transnational casts or reciprocal investment. Explore joint development early to build mutual understanding and find shared goals. Tap into UK-based research on real-life stories with transnational potential as a neutral starting point.

3. International film festivals as a strategic soft entry

Compared to commercial releases which come with the restricted distribution system, China’s film festival landscape offers a more accessible entry point. Cities such as Shanghai, Beijing, Pingyao and Shenzhen host internationally recognised festivals with special permissions to screen foreign films. Even though some local governments cap festival screenings before they count as commercial distribution, it is still a strategic soft entry.

There is increasing emphasis on reciprocity. Chinese authorities now expect international festival partners to also support the outbound screening of Chinese films abroad. The most mature example of this model is China–France cooperation, where sustained institutional commitment has led to one of the longest-running bilateral film exchange frameworks in the world.



Many UK filmmakers think they have a film ‘about China’ but you can’t just sell an ‘oriental idea’ back to Chinese audiences.

The co-production treaty exists, but it's underutilised and can be too bureaucratic.

—Dr. Hiu Man Chan, Senior Lecturer in Creative Industries, De Montfort University, Founder of UK-China Film Collab (NGO)



Our NGO has a lot of reciprocity in our pocket—we’ve showcased Chinese films in the UK. That gives us leverage to help UK films or film-related projects go to China.

—Dr. Hiu Man Chan, Senior Lecturer in Creative Industries, De Montfort University, Founder of UK-China Film Collab (NGO)

Since 2004, France has hosted *Panorama du cinéma français en Chine*⁶⁰, an annual multi-city showcase of contemporary French cinema in China, organised by UniFrance in collaboration with the French Embassy in China. The festival includes screenings, networking events, and meetings between French and Chinese film industry professionals, and has become a cornerstone of Sino-French cultural relations. Its 2025 edition toured ten Chinese cities including screening and events in Shanghai, Nanjing, Beijing, Wuhan, Hangzhou, Chengdu, Xi'an, Guangzhou, Shenzhen and Kunming.

In return, China's *Festival du cinéma chinois en France (FCCF)*⁶¹ has run since 2011, co-organised by the China Film Administration and the Centre culturel de Chine à Paris. It tours cities such as Paris, Lyon, Marseille, Strasbourg, Cannes and Brest, bringing contemporary Chinese films to French audiences annually.

Opportunities: The bilateral film festival model between France and China demonstrates the value of long-term, government-level cultural diplomacy. It has proven effective in strengthening cultural exchange, audience development, and creating a platform for mutual market access - especially within China's highly regulated film distribution environment.

At the same time, individual film productions can partner with UK entities already active in China or those who have experience in reciprocal programming. Support outbound Chinese screenings in the UK to build diplomatic reciprocity and unlock local permissions.

4. Blockbusters in decline, arthouse cinema on the rise

Mainstream cinema in China has seen a decline in large-budget foreign blockbusters, constrained by tighter funding and policy volatility. Yet audiences in first-tier cities like Shanghai—home to one of the world's largest cinephile populations—continue to seek out diverse, international content. Art-house cinema, biopics, and independent productions remain niche but are increasingly valued, particularly among younger, culturally engaged audiences.

Chinese audiences often struggle to differentiate British cinema from American productions. Cultural references (e.g. *Downton Abbey*, *Paddington*) are familiar, but the broader identity of contemporary UK film is not well understood. A reliance on Hollywood-style co-productions has diluted the visibility of uniquely British narratives.

Opportunities: There is a growing room for UK films to establish their own contemporary voice in China distinct from Hollywood. UK films can stand out by foregrounding emotionally resonant stories, character depth, and authentic narrative craft. Biopics, rooted in British research rigour and storytelling, offer a niche appeal for Chinese audiences. While the current UK film appearance in China remains ad hoc, a recurring, bilateral framework mentioned above could help build sustained visibility for British cinema, provide inroads for independent UK filmmakers, and increase British films' awareness in China's fast-growing film landscape.

5. Widening skills gaps and growing need for professionalism

The professionalism in China's film industry is uneven, and career paths are less specialised compared to the UK. Post-pandemic, China's film workforce has thinned, and skill gaps are widening. This creates both challenges and space for knowledge-sharing. Chinese studios and crews are keen to learn from global experts, as evidenced by the heavy use of Hollywood VFX houses in Chinese blockbusters and the hiring of foreign consultants for action design or script development on some projects.

Government and private sector are investing in training and restoration, with new festivals and partnerships emerging around classic cinema and film heritage. In 2023, China Film Archive, Douyin and Huoshan Searching Engine initiated a partnership to restore classic Hong Kong movies⁶². In 2024, the China Film Administration hosted the inaugural Classic Film Festival⁶³ in Suzhou, dedicated to showcasing 16 restored classical films from China and abroad.

Opportunities: UK institutions like BFI, film schools, and post-production studios can offer workshops, short-term residencies, or training exchanges. UK professionals can offer knowledge and training in expertise areas like screenwriting, special effects (VFX), and film preservation. Film archiving and restoration are emerging fields of bilateral interest—jointly restoring a historical film for exhibition in both countries would combine technical exchange with cultural diplomacy.



Case studies

In this section we showcase a mini typology of UK-China collaborations in film in the past few years. From co-productions, academic and cultural exchange, they demonstrate the scope, scale and creativity possible when UK and Chinese partners build relationships rooted in mutuality. These models are not mutually exclusive, many successful collaborations combine elements of several.



Official co-productions under the UK-China treaty

- *Earth: One Amazing Day* (2017): a nature documentary co-produced by BBC Earth and Shanghai Media Group
- *The Foreigner* (2017): an action-thriller starring Jackie Chan and Pierce Brosnan, directed by Martin Campbell
- *Special Couple* (2019): Mandarin-English romcom filmed in Belfast, starring Aarif Rahman and Rupert Graves.

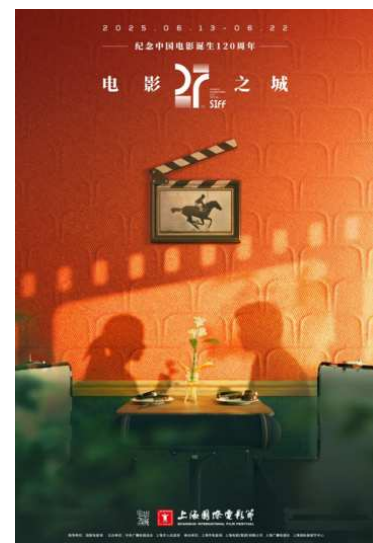
These projects leveraged the 2014 co-production treaty, allowing them to bypass import quotas and access both domestic markets as “local” films. Success has been mixed—highlighting the need for deep mutual involvement from early stages, shared authorship and deep alignment beyond joint branding. (Official poster © Zephyr Films, Dimension Films, Shanghai Media Group)



UK Focus at Shanghai International Film Festival 2025 British Council x Shanghai International Film Festival⁶⁴

In 2025, the British Council partnered with the Shanghai International Film Festival (SIFF) to launch the 'UK Focus / 艺述英国' strand—an official film selection curated to showcase the innovation, diversity, creativity and excellence of UK screen culture to Chinese audiences.

The programme includes 6 films spanning documentary, arthouse, and social realism, representing the best of what the UK has to offer in terms of storytelling and filmmaking. The line-up include *The Prime of Miss Jean Brodie* (1969), a restored British classic honouring the late Maggie Smith, *Hard Truths* (2024) by Mike Leigh, *Bird* (2024) by Andrea Arnold, *Santosh* (2024) by Sandhya Suri, and *On Falling* (2024) by Laura Carreira, alongside *A Sudden Glimpse to Deeper Things* (2024), a new documentary by Mark Cousins. (Image © Shanghai International Film Festival)



Exchange screenings through international film festivals

- Electric Shadows: Leicester Chinese Film Festival
- Odyssey⁶⁵ by UK-China Film Collab⁶⁶
- British Film Master Season in Shanghai⁶⁷ (funded by Shanghai Film Distribution and Exhibition Association and its Shanghai Art Film Federation, supported by UK-China Film Collab)

These events build mutual appreciation and often involve panel discussions, Q&As with filmmakers, etc. They foster dialogue, bring niche and independent work to new audiences, and build long-term trust between curators, critics, and filmmakers. Many are low-cost and highly relational, partially supported by cultural grants. (Image © Shanghai Art Film Federation)

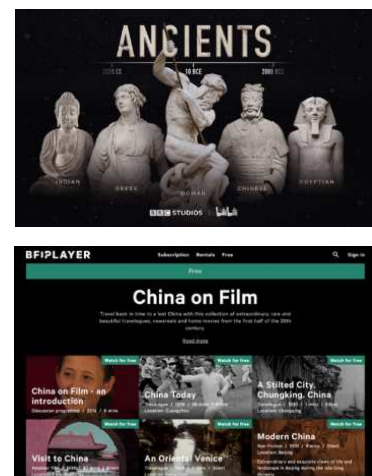


Digital streaming and distribution

Partner: BBC Studios x Bilibili - *Ancients*⁶⁸, 2020

At the 2020 Guangzhou International Documentary Film Festival, BBC Studios and Bilibili announced *Ancients*—their first international co-production featuring Chinese stories, following a strategic partnership agreement. China's streaming giants (iQiyi, Tencent Video, Bilibili) are increasingly looking for fresh content to attract subscribers. While direct access to these platforms can be difficult due to content regulations, UK distributors may explore licensing curated content—especially documentaries, biopics, children's films, or culturally adaptable stories that can be translated well to the Chinese audiences. (Image © BBC)

Institutions like the BFI⁶⁹ could also partner with the China Film Archive to co-restore and stream classic Chinese films—supporting cultural exchange while preserving heritage. (Image © BFI)





Music

Music in China at a glance

China's music industry is large, fast-evolving, and increasingly diverse. In recorded music, China became the world's fifth largest market in 2023, driven by a sharp increase in paying users on platforms like Tencent Music and NetEase Cloud. Meanwhile, the live sector is booming post-pandemic, with over 36 million people attending large-scale concerts and festivals in 2024. From orchestral tours to underground bands, China now offers both scale and segmentation—where digital and physical, classical and contemporary, commercial and experimental coexist.

The dominance of streaming and short video platforms is reshaping how music is produced, distributed and consumed. But beyond algorithms and online fandoms, there is a growing appetite for authenticity, co-creation and cultural connection. Musicians are increasingly collaborating across genres and cultures, and local governments are backing music events as part of tourism and soft power strategies.

- **£1.07 billion** (\$1.45 billion): Recorded music revenue in 2023 (5th largest globally, +25.9% YoY)
- **36.5 million**: Attendees at large-scale music events in 2024
- **788.57 million**: Attendees at small and mid-sized concerts in 2023
- **726 million**: Online music users in 2023

Opportunities for UK partners

Compared with other art forms, music crosses borders with emotional immediacy and relatively low regulatory risk, making it one of the most open and dynamic sectors for cultural exchange with China. While the commercial landscape is competitive and platform-dominated, the appetite for learning, residencies, and hybrid musical experiences is growing—especially in second-tier cities.

- **Explore the middle scale**: for SME UK partners, China's music scene offers far more than stadium tours. Collaborate with local music agencies to access local live houses, conservatoires, and midsize festivals for meaningful audience engagement and development.
- **Bridge traditions with innovation**: There is untapped space for pairing Western genres with Chinese instruments. UK-China collaborations can nurture new sonic languages while supporting underrepresented traditions.
- **Leverage China's hybrid digital-physical formats**: Live-streamed concerts, virtual fan interactions, and direct artist tipping are integral to how Chinese audiences engage. UK artists and labels can experiment with these hybrid engagement models—not just to reach audiences, but to learn from them.

Market development timeline

1990s

Cassette and CD Era Emergence and Exploration

A boom in Mandarin pop and Cantonese pop with the southern region led to the commercialisation of pop music. Chinese Rock appeared under the global music influence. Early music festivals appeared.

- 1991** Tang Dynasty's first album.
- 1993** Beijing Music Radio was founded.
- 1993** Beijing Midi School of Music was founded.
- 1994** Hong Kong Coliseum - Rock China Power Concert.
- 1995** Beginning of Beijing's underground bar scene.
- 1997** Modern Sky was founded.
- 1997** The 1st Midi Music Festival took place.
- 1998** The 1st Beijing International Music Festival took place.

2000s

MP3 and Internet Music Era Digitalisation, Commercialisation and Emerging Talent Show

Portable music devices appeared, and so did the internet and downloadable music, online albums and MP3s. Both mainstream and underground music flourished.

- 2000** Pianist Lang Lang became the 1st Chinese winner of the Chopin Competition, inspired millions of young Chinese to take up piano.
- 2000** China Philharmonic Orchestra was formed based on the previous China Broadcasting Symphony Orchestra.
- 2001** 90% of audio-visual content not copyrighted.
- 2002** Baidu MP3 search launched.
- 2004** Kugou Music launched.
- 2004** TV talent show 'Super Girl' gave rise to nationwide pop superstar Li Yuchun in 2005.
- 2004** The Royal Philharmonic Orchestra first visited China.
- 2005** QQ Music launched 2005 "The first year of digital music", as digital music sales surpassed physical sales.
- 2008** Xiami Music launched.
- 2007** The first Modern Sky Festival in Beijing launched.
- 2007** Mao Livehouse opened in Beijing.
- 2009** Strawberry Music Festival year 1.

2010s

Streaming and Music Talent Show Algorithms and Entertainment

With 5G and unlimited data, music streaming became available. The way music is consumed has completely shifted and become embedded in digital platforms and social media. Music recommendations shifted towards algorithms. Driven by long-form video platforms iQiyi, Rap and Rock and Roll became popular through music talent shows. Music from here became increasingly entertainment-oriented.

- 2013** NetEase Cloud Music launched.
- 2015** QQ Music launched digital album sales.
- 2015** The strictest music copyright regulation launched. 2.2M songs were pulled offline.
- 2012-2017** Exclusive music copyright war among platforms lasted for almost 6 years.
- 2018** QQ Music, NetEast Music and Ali Music reached an agreement to share copyrighted music, putting the war to an end.
- 2017** iQiyi The Rap of China Season 1.
- 2018** iQiyi The Rap of China Season 2.
- 2019** iQiyi The Big Band Season 1.

2020s

Online Live Concert Audio-visual Production

The format of online concerts became popular during the pandemic. With ultra HD digital technology, technology allows music to transcend time and space. These productions were staged offline and streamed not just on music platforms but also social media and video platforms. Music platforms hold increasing power in deciding exposure and recommendations. The grassroots area gave way to one dominated by commercial value and online traffic.

- 2020** Tencent TME Live launched.
- 2020** NetEase Cloud Live launched.
- 2021** Xiami Music closed down.
- 2021** China as 6th largest recorded music market.
- 2022** China as 5th largest recorded music market.
- 2020** iQiyi The Big Band Season 2.
- 2023** iQiyi The Big Band Season 3.
- 2023** Royal Philharmonic Orchestra signed a new MOU with the National Centre for the Performing Arts (NCPA), Beijing.
- 2024** Royal Philharmonic Orchestra returned for a China tour after COVID-19 pandemic with concerts in Beijing, Shanghai, Xiamen, Changsha, Wuhan and Nanjing.

Market overview

China's music sector is rapidly expanding—digitally dominant, demographically young, and shaped by shifting consumption patterns. Streaming platforms and live music now form twin pillars of the market, while orchestral and classical music remain influential due to decades of investment in education and infrastructure. Digital platforms continue to redefine exposure, while live music attendance has rebounded strongly post-pandemic, with both mega-concerts and grassroots gigs drawing large audiences.

Market size

- **Recorded music:** China was the world's 5th largest recorded music market in 2023, with revenues of **£1.07 billion** (\$1.45 billion), up 25.9% year-on-year—the fastest growth among the top 10 global markets (IFPI). This marks a historic leap from 19th place in 2014.
- **Paying users:** Tencent Music alone had **121 million paying users** by late 2024 (up 13.4% year-on-year). However, per capita spend of ¥11.1 (£1.17, up 3.7% year-on-year) remains low compared to Western markets, suggesting substantial room for growth as paid models gain traction.
- **Large scale live events:** In 2024, large concerts and festivals (>5000 capacity) generated £3 billion (¥29.6 billion, up 48% from 2023), with 36.5 million attendees (up 3% from 2023) across 2,700 shows⁷⁰.
- **Small and mid-size concerts:** In 2023, small and medium music concerts (<5000 capacity) generated £2.2 billion (¥21.82 billion), with 788.57 million attendees across 28,000 shows⁷¹.

Market segment

- **Online streaming:** China's digital music landscape is dominated by Tencent Music (operating QQ Music, Kugou, Kuwo, and karaoke app WeSing) and NetEase Cloud Music. Unlike Western streaming platforms, these platforms combine streaming with social media, fan interaction, live performance tipping, and user-generated content. In 2023, the number of online music users reached **726 million**⁷².
- **Live music:** Live music in China has grown from an embryonic scene in the 1980s to a major industry segment today. Every sizable city and province in China now hosts music events. Chains like MAO Livehouse spread to half a dozen cities. Local governments increasingly back music events and festivals to boost tourism and the night-time economy.
- **Classical and orchestral music:** Professional orchestras have grown from under 20 in the early 2000s to over 80 in 2023⁷³. Compared with other art forms, music education in China is extensive, highly valued by families, and supported by government policy. Tens of millions of children learn instruments, especially piano and violin. Every major city has a conservatory or music college that not only trains Western classical but also traditional Chinese music forms.
- **Online concert streaming** popularised during the pandemic. Platforms like Tencent's TME Live platform offer high-quality virtual concerts by Chinese and Western artists for Chinese audiences, a format likely to continue as a hybrid model.



Key trends and opportunities

This section distils insights from in-depth conversations with Chinese and UK music professionals. These interviews reveal four trends that reflect current trends and opportunities for UK stakeholders where mutual value, skill-sharing and long-term trust are prioritised.

1. Music as a bridge connecting cultures beyond words

Music serves as a uniquely effective cultural bridge because it communicates emotion directly, without relying on language. With instrumental works and cross-cultural compositions generally navigating linguistic and political boundaries more easily, it is more accessible than many other art forms. Many contemporary music styles (from classical to rock to electronic) have global reach, offering a shared framework that can be collaborated on locally. Western classical repertoire is widely respected in China, and there is a growing appetite for hybrid sounds that blend genres and cultures.

Opportunities: UK musicians and institutions can use music's emotional immediacy and low language barrier to create powerful shared experiences with Chinese audiences and collaborators. Projects grounded in universal themes such as joy, place, memory, identity can resonate with audiences cross-culturally more easily.

2. World-class infrastructure awaits sector development

China boasts impressive hardware infrastructure - concert halls, stadiums, orchestras, conservatories - but lacks the soft infrastructure that supports sector development. It also means Chinese musicians may have fewer opportunities to engage in the global music industry beyond education, despite world-class training.

Unlike the UK where music boards, trade bodies, and regular conferences offer policy and community forums, China lacks formal cross-sector music convenings. Musicians often operate in fragmented or informal networks. UK musicians entering China may struggle with logistics, permissions, and planning without the right local partners.

Opportunities: UK organisations experienced in sector development—especially those with track records in cultural relations—can play a valuable bridging role. This may include co-developing showcases, hosting joint producer dialogues, supporting Chinese artists' industry access, or offering logistical frameworks for bilateral tours.

“

You can absolutely provoke with music—but you need to try very hard.

—Sid Peacock, composer and artistic director, Surge Forward Music & Arts

“

The world-class facilities are there. But how do you build world-class collaborations?

—Andrew Lansley, Innovation Manager, Cheltenham Festivals

3. Start small: begin with people

Many successful sustained UK-China music collaborations often started with exploratory, low-pressure engagements, rather than straightaway high-stakes touring or formal exchanges. Careful and low-stakes collaborations allow both sides to test technological, artistic, legal and interpersonal alignments without risking reputation or over-promising. Collaborative projects that allow both parties to exchange ideas in low-stakes environments create safer spaces for risk-free experimentation. From a cultural relations perspective, this process of mutual listening and adaptation is a strength, not a delay. When successful, it lays the groundwork for deeper, more formal cooperation.

Opportunities: Begin with people, not projects. Focus on modest, open-ended engagements such as studio visits, online dialogues and rehearsal exchanges that allow ideas to emerge naturally. This trust-first approach doesn't delay impact—it lays the foundation for more durable, reciprocal partnerships.

“

We need low-risk, non-commercial ways to build trust before we talk about outcomes.

—**Andrew Lansley**, Innovation Manager, Cheltenham Festivals

Both parties have to feel they're equal contributors and that's worth their while. They have to feel they both learned and grown, and their contribution has been relative, not just fitting into somebody else's.

—**Sid Peacock**, composer and artistic director, Surge Forward Music & Arts



4. Untapped potential: Western genres meet Chinese instruments

There is growing interest—both in China and the UK—in fusing Western music forms (e.g. jazz, classical, experimental) with Chinese traditional instruments. Yet the UK lacks formal structures (e.g. music schools, community programmes) to support this kind of creative hybridisation.

Unlike other diaspora communities, Chinese musical traditions in the UK remain underrepresented in public education and community programming. There are relatively few places where people—Chinese or otherwise—can learn to play Chinese instruments or engage with traditional repertoire. In China, by contrast, musicians trained in both classical and traditional forms are increasingly open to fusing styles. These musicians often bring deep knowledge of performance and strong technical skills, making them ideal collaborators.

Residencies can be a great way to provide an immersive, low-pressure setting for skill exchange and genuine relationship-building. Second- and third-tier cities in China like Chengdu and Chongqing - less saturated and more open to experimentation - are especially fertile ground.

Opportunities: There is a significant opportunity to develop fusion-based learning and co-creation. UK music educators, producers, and institutions could pilot programmes pairing British musicians with Chinese instrumentalists, or establish youth-focused ensembles that blend traditions. These projects can begin modestly as creative workshops or longer-term residencies and evolve into new forms of musical expression with global resonance. Creating opportunities for UK early-career musicians to work and learn for an extended period of time can yield deep mutual understanding and lead to sustained collaborations. Equally, creating space for Chinese musicians to work in the UK (beyond formal study) could strengthen sector links and increase diversity in British music.

“

For the UK, the commercial narrative of accessing 1.4 billion audience often seems to dominate that of the creative. There is less desire to share Chinese music culture - Western genre x Chinese folk instrument has huge untold mutual benefits.

—Andrew Lansley, Innovation Manager, Cheltenham Festivals

“

West-meets-East fusion is still rare—but deeply powerful when it happens.

—Musician in Chengdu, China

“

You have many Indian, Irish music schools in the UK teaching traditional music. You'll find jazz, African drumming, but I don't think there's an established Chinese instrument programme.

—Sid Peacock, composer and artistic director, Surge Forward Music & Arts

Case studies

In this section we showcase a mini typology of UK-China collaborations in music in the past few years. From strategic orchestral partnerships to indie music tours, they demonstrate the diverse formats, partners, and long-term value that music collaboration can generate rooted in mutuality. These models are not mutually exclusive, many successful collaborations combine elements of several.

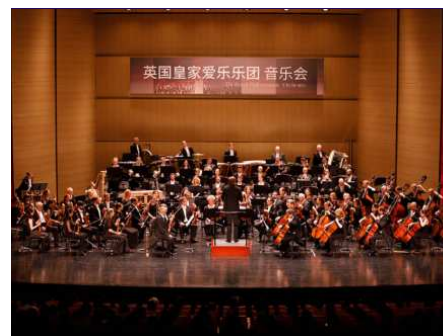


5-year strategic partnership

Royal Philharmonic Orchestra x Beijing Poly Theatre Management⁷⁴

The partnership was designed to widen access to great orchestral music across China. Since 2004, Royal Philharmonic Orchestra (RPO) has made a few China tours, with the most recent one⁷⁵ in 2024 supported by Armstrong International Music & Arts⁷⁶. The 2024 tour delivered concerts and workshops in Beijing, Shanghai, Shenzhen, Xiamen, Changsha, Wuhan and Nanjing, deepening cultural ties⁷⁷.

In 2023, RPO also signed a new MOU with National Centre for the Performing Arts (NCPA), Beijing, deepened institutional exchange through collaborative concerts and staff placements. (Image © Royal Philharmonic Orchestra)



Royal Scottish National Orchestra's New Year China Tours⁷⁸

- 2012/13 - Beijing, Shenzhen, Guangzhou, Tianjin and Macau
- 2018/19 - Nanning, Zhuhai, Shenzhen, Linyi, Jinan, Beijing⁷⁹
- 2024/25 - Shenzhen, Nanjing, Nanchang, Beijing, and Hangzhou

Royal Scottish National Orchestra's regular China tours reflect strong demand for British classical music. Each tour involved performances in major cities, soft power support from UK and Chinese stakeholders, and cultural exchange with alumni networks, local businesses, and Chinese audiences. (Image © Royal Scottish National Orchestra)



Trinity Boys Choir's China tours

- 2016 - Shanghai International Arts Festival
- 2018 - Guangzhou, Changsha, Wuhan, Zhuhai, Beijing
- 2024 - Shenzhen, Changsha, Wuhan, Shanghai, Suzhou, Xiamen, Chengdu, Xi'an, Shenyang, Beijing

The choir gave six concerts in their first tour in China in 2016 and undertook a major 10-concert tour of China in 2018⁸⁰, and returned again in August 2024⁸¹. David Swinson, the Choir Director at the time, hoped that the Chinese and British people could build a bridge of friendship through their musical performances⁸².

Shenzhen Symphony Orchestra's UK Tour

Chinese orchestras also increasingly tour the UK. For example, the China Philharmonic and Shanghai Symphony have performed at the BBC Proms and in British concert halls. In March 2024, Shenzhen Symphony Orchestra made their debut 8-venue UK tour, including London, Birmingham, Manchester, Edinburgh, Sheffield, Perth and Basingstoke. This tour was sponsored by Shenzhen Zhenxing Symphony Development Foundation, a state-owned charity⁸³, and organised by Armstrong International Music & Arts Enterprises Ltd. (Image © eyeshenzhen)



Label co-development and promotion exchange

- Modern Sky x Liverpool Sound City, 2016 - ongoing
- Modern Sky x ATC Group, 2024 - ongoing

China's largest independent music company, Modern Sky, launched Modern Sky UK in partnership with Liverpool Sound City to give Chinese artists access to UK audiences and let emerging UK acts tap into China's growing live circuit.

For example, UK acts like Red Rum Club and The Blinders gained label support and performance slots at Chinese festivals, and Chinese bands like Re-TROs got to tour in the UK⁸⁴.

Modern Sky's new 2024 partnership with ATC aims to scale up artist and event exchange in both directions.



Musician Residencies

Partner: The British Council/PRS for Music Foundation

Over five editions, Musicians in Residence China⁸⁵ has sent over 20 UK musicians to various Chinese cities since 2011. In 2019, new partnerships with Chinese hosts (e.g. Shanghai's Xintiandi and World Music Asia festival) allowed resident UK musicians to perform at major events. These low-stakes, exploratory residencies have led to lasting artistic relationships and even new band formations blending UK-China members.



UK-China Youth Cultural Exchange programme⁸⁶

In May 2025, The Birmingham City Council and Royal Birmingham Conservatoire launched a UK-China Youth Cultural Exchange Programme. The initiative invites over 100 young music talents from Chinese cities such as Nanjing and Guangzhou to join British youth orchestras for a series of concerts, artistic collaborations, and exchange activities in five UK cities, including London, Birmingham, and Cambridge.

Sid Peacock's two-decade journey with Chinese traditional music

Composer Sid Peacock⁸⁷, born in Bangor, Northern Ireland, has built a two-decade relationship with traditional Chinese music, bringing them into his artistic vision at the intersection of jazz, improvisation and contemporary music.

His journey began in 2006 at the invitation of a former student, which sparked a deep and lasting interest in Chinese musical traditions. In 2014, Sid went for a 6-week residency at Chongqing Chuanju Opera Theatre through the British Council/PRS Musicians in Residence China. That experience inspired *Open A Little Door* (2020), a unique and fiery fusion of Chuanju Opera Style, folk, roots and groove⁸⁸ co-created by his UK-based Surge Orchestra musicians and Chuanju Opera Theatre musicians. Sid was made an Honorary Ambassador for Sichuan Opera. In 2023, with British Council support, he collaborated with Pingtan artist Lu Jinhua for a new work premiered at Shanghai's Xintiandi World Music Festival⁸⁹. In 2024, a new opportunity emerged unexpectedly: a young audience from his 2014 residency—now a director—invited Sid to Changsha to create music for a new Chinese immersive opera *Nie Xiaoqian*⁹⁰. "You never know what a new day will bring." Sid wrote, "I arrived, had one day's rest, and then just worked constantly until I got back on the plane." he recalls, "no photo ops, no shaking hands - I was just like part of the team". His story is a testament to the unpredictable but profound outcomes of sincere, sustained cultural exchange. (Image © Sid Peacock)



Concert tours for independent musicians

Indie booking companies and intermediaries like Beijing's Haze Sounds⁹¹ and Xi'an-based SoundFact specialise in introducing international bands to China. These tours often span multiple cities, tapping into grassroots venues and digital fanbases, supported by hybrid public-private investment models.

For example, Haze Sounds has successfully brought UK artists such as TOY, Wolf Alice, and Carnival Kids (UK/ Norway) to Chinese audiences. In 2025, the agency organised the debut China tour for the London-based psychedelic rock band Temples⁹², with performances in Shanghai, Beijing, and Wuhan, which boosted a substantial fanbase in China.

SoundFact helped the Manchester-based rock band Maruja make their debut China tour in 2025, spanning Beijing, Shanghai, Hangzhou, Wuhan, Shenzhen and Guangzhou.



Festival exchange with city partnership The city of Hangzhou x Montreux Jazz Festival China

In October 2021, the Montreux Jazz Festival, a globally renowned event originating from Switzerland, launched its inaugural Chinese edition in Hangzhou, Zhejiang province. The festival embraced the theme "When West Meets East," curating a diverse lineup that combined Chinese and Asian musical traditions with jazz, a genre experiencing renewed interest in China. Beyond merely hosting festivals, it was a strategic partnership with the city to leverage its rapid development and cultural heritage. For UK stakeholders, this provides a model to honour both local and international musical experience, as well as tapping into the growing movement in city branding and placemaking.





Literature

Literature in China at a glance

China's literary landscape today remains a state-prioritised cultural industry with ideological oversight, creative ambition, and international aspirations. Literature in China spans a remarkable range of segments and formats, each with its own trends and importance. From ancient classics to cutting-edge web novels, and from state-funded academic monographs to mass-market genre fiction, the breadth is enormous.

It is home to the world's largest online reading audience, with over half a billion digital readers and millions of active authors. While the print market remains robust, it is the industrial-scale rise of web literature, audio formats, and live-streamed book content that sets China apart. This expansion has propelled literature from solitary reading to participatory fandom and IP creation—where novels become games, films, and global franchises. While commercial trade in literature is not the focus in this report, for UK stakeholders, China's literature industry presents a space where mutual curiosity and long-term partnership can flourish, particularly in areas of digital innovation, education, translation, and festival programming.

- **£9.39 billion** (¥91.2 billion): China's print book market value in 2023
- **£164.8 billion** (¥1.6 trillion): Total digital publishing sector value in 2023
- **537 million** readers
- **24 million** writers

Opportunities for UK partners

For UK stakeholders, China's literary sector offers both scale and specificity—where print publishing, digital reading, and live literary culture coexist. While policy sensitivities and language barriers exist, there is an appetite for international dialogue, peer-to-peer exchange, and high-quality translation. The path forward lies in finding shared themes and formats that enable mutual exchange.

- **Festival exchange:** Book fairs and literature festivals are effective soft entry points. UK partners can use these settings to meet Chinese counterparts, showcase UK writing, and understand China's evolving literary ecosystem.
- **City-to-city literary collaboration:** like the Manchester–Nanjing partnership, city-level partnerships demonstrate how literature can bridge cultural and civic engagement. These exchanges can bring together writers, readers, educators, and cultural policymakers. UK organisations can take the lead in shaping reciprocal projects.
- **Digital literature and innovation:** China is a world leader in digital publishing and online literature. UK publishers, libraries and literary institutions can experiment with co-producing digital collections, audio content, or interactive formats.

Market development timeline

1990s

Publishing Commercialised and Global Integration

Publishing becomes commercialised. The industry welcomes private capital (via ISBN leasing), grows genre fiction, and enters the global market.

- 1986** Beijing International Book Fair (BIBF) was founded.
- 1994** Publishing was designated as part of China's cultural industries.
- 1997** *Rongshuxia* ("Under the Banyan Tree") becomes China's first major online literature site.
- 1999** China is a guest of honour at the Frankfurt Book Fair.
- 2000** Gao Xingjian won the Nobel Prize in Literature.

2000s

Digital Publishing and the Web Literature Boom

Online literature platforms emerge and flourish. Traditional publishing expands while digital writing is commercialised.

- 2001** Qidian (Starting Point) web novel platform was founded.
- 2002** Online second hand book trading platform Kongfz.com was founded.
- 2003** Jinjiang Literature City was launched, later dominating in online romance.
- 2004** Shanda created China's first online literature conglomerate.
- 2004** Shanghai Book Fair was founded.
- 2006** Government supported digital publishing in the 11th Five-Year Plan.
- 2007** Bookworm Literary Festival was founded by The Bookworm bookstore Beijing.
- 2008** Internet authors were admitted to the China Writers Association.

2010s

Mobile Reading and Industry Consolidation

Online reading becomes mainstream via smartphones. Digital platforms consolidate; literature becomes a multi-platform IP economy.

- 2012** Mo Yan won the Nobel Prize in Literature.
- 2013** Tencent launched its literature division.
- 2013** China Shanghai International Children's Book Fair launched.
- 2015** Tencent merged with Shanda to form China Literature Ltd.
- 2015** Tencent launched WeChat Reading APP.
- 2016** The first China Science Fiction Convention was held in Beijing.
- 2017** China Literature's IPO raised \$1 billion in Hong Kong.
- 2019** Nanjing was named a UNESCO City of Literature.
- 2019** The Bookworm bookstores closed.

2020s

Digital Maturity and Global Reach

Literature thrives in a hybrid digital/print ecosystem. Online literature, audio formats, and global collaborations expand.

- 2021** New regulations tighten oversight on online content.
- 2022** Short-video apps become the second-largest book sales channel.
- 2023** China's digital publishing sector reaches ¥1.6 trillion.
- 2024** British Library and China Literature Ltd. launch joint digital literature programme.
- 2024** Manchester and Nanjing begin a 9-month UNESCO literary exchange.

Market overview

China's literature landscape is shaped by its dual structure: a legacy print industry dominated by state players, and a dynamic, tech-enabled digital sector. While print book sales remain strong, the most disruptive growth is in online literature, mobile reading, and audio-visual formats. Domestic consumption dominates, with a limited but growing emphasis on international exchange and outbound literary influence.

Market size

The total value of China's book publishing sector (print and digital) is substantial.

- **Print book retail market:** ¥91.2 billion in 2023 (≈£9.39 billion), up 4.7% from 2022
- **Digital publishing:** reached ¥ 1.6 trillion in revenue in 2023, up 19% year-on-year⁹³. (including e-books, online journals, mobile content, as well as online gaming and ads)
- **Digital reading:** ¥11.3 billion in revenue (2023)

China Literature (Yuewen) reports an ecosystem of **over 537 million readers and 24 million writers** on its platforms, with 2 million new literary works added online in 2023 alone⁹⁴. Web literature has become an industrialised content engine.

Market segment

- **Print vs. digital:** Digital platforms now dominate reader engagement, especially among younger users. E-commerce and short-video platforms like Douyin and Kuaishou are now crucial to book discovery and promotion, enabling influencers, authors and publishers to promote titles through bite-size content, live streaming and personalised recommendations, reshaping the publishing value chain. While print publishing has stabilised post-pandemic, physical bookstores continue to decline, as rising rents and digital competition erode traditional retail models.
- **Book festivals and fairs:** despite digital dominance, major book fairs and literary festivals continue to play a strategic role, especially for relationship building, rights trading and cross-cultural engagement. Events like the Beijing International Book Fair (BIBF) and the Shanghai Book Fair remain important convening spaces for publishers, agents, translators, and institutions—serving as launchpads for new titles and as critical arenas for foreign rights negotiation and translation deals.
- **Domestic orientation:** China's literary ecosystem is heavily localised. Over 90% of books sold are written and published domestically. Translations account for a small fraction, and English-language imports remain niche. By contrast, the UK book market is highly international, both as an exporter and as home to globally translated works. This asymmetry presents both a challenge and an opportunity for cultural exchange.
- **Publishing infrastructure:** In the UK, publishing is a private, market-driven industry with no need for government licenses, aside from standard copyright and libel laws. China maintains a dual system where state-owned ISBNs and distribution networks (e.g. the Xinhua bookstore chain) coexist with an emergent private sector (e-commerce giants and small presses partnering with state firms). This creates unfamiliar huddles to UK publishers and demands patience, trusted intermediaries, and local understanding.



Key trends and opportunities

1. Literature is going multi-format: Audio, video, and social media integration

Audiobooks and literary podcasts are on the rise. Platforms like Ximalaya FM and Qingting FM have millions of users listening to book content, and many web novels are adapted into audio dramas. Short-video apps (Douyin and Kuaishou) have also become influential in the book world – creators produce bite-sized book reviews or even live-reading sessions, blending literature with social media. Whereas the UK still relies heavily on traditional bookstores and Amazon, by 2023 short-video platforms became the second-largest channel for book sales in China⁹⁵, after e-commerce, as influencers live-stream book promotions.

Opportunities: UK publishers and literature professionals can experiment with new storytelling formats through partnerships with Chinese platforms beyond paper. Collaboration might involve reading short stories into audio mini-series, short videos for social media, or co-producing live-streamed reading with influencers.

2. Tightening content censorship

The current ideological oversight of literature has tightened somewhat, but support for literature as a soft power persists. The 14th Five-Year Plan (2021–2025) includes goals for enhancing China’s cultural influence, which means continued funding for literature that can “go global” and more state-curated exchange programs.

Regulations introduced in 2021 placed new limits on fan fiction and online romance genres (as part of a broader cyberspace clean-up), challenging web platforms to police content even more. Nonetheless, the state also launched initiatives like the National Publishing Fund to subsidise important literary and scholarly works, and campaigns to promote reading classics and President Xi’s writings. The balancing act between creative freedom and control remains a defining tension of the 2020s.

3. Science fiction boom

Genre fiction has experienced significant growth and popularity in China over the past decade, becoming a notable cultural and commercial phenomenon.

Science fiction, in particular, has emerged from a niche genre into a mainstream cultural force. Key milestones include Liu Cixin’s *The Three-Body Problem* receiving the Hugo Award in 2015, marking the first Asian novel to achieve this distinction. Its success has propelled interest in Chinese speculative fiction internationally and domestically, prompting significant investments in adaptations across film, television, animation, and video games.

The China Science Fiction Convention (CSFC), established in 2016, has rapidly grown into a vibrant gathering that attracts leading writers, filmmakers, publishers, industry professionals, and thousands of fans from across China and internationally, exploring science fiction’s role in literature, cinema, animation, gaming, and emerging technologies, facilitating international dialogues and collaborations.

4. China’s literature “going out” and language barriers

In 2019, Nanjing became China’s first UNESCO “City of Literature,” signifying international recognition of its rich literary heritage. Liu Cixin’s *The Three-Body Problem* trilogy achieved worldwide fame and a TV adaptation deal with Netflix by the early 2020s, marking perhaps the first Chinese literary franchise to penetrate Western pop culture so deeply. Such cases exemplify China’s literary “going out” success, a trend likely to continue with official backing.

However, while there is strong demand for Chinese-to-English literary translation, there is also a shortage of skilled translators. UK publishers, universities, and funders could jointly support residencies, mentorships, and translator development programmes to grow this vital talent pipeline.

Case studies



British Library x China Literature (Yuewen), 2024 - 2027

This three-year collaboration explores the rise of digital literature in China, connecting Yuewen's vast online ecosystem (home to 24 million authors and over 500 million readers) with the British Library's audience and curatorial and archival expertise.⁹⁶ It involves exhibitions, events, and knowledge exchange on preserving digital literary works and making web fiction accessible to English readers. The partnership marks a pioneering public-private, UK-China partnership highlighting digital literature as a cultural bridge.



Manchester x Nanjing, 2024-25 UNESCO Cities of Literature Exchange

Funded by the British Council's International Collaboration Grant, this 9-month programme⁹⁷ brought together poets, illustrators, and playwrights from both cities to explore shared themes of nature and contentment. The project featured reciprocal residencies, a bilingual poetry collection, a cross-cultural play, and school engagement initiatives – on themes of nature and “Real Contentment” inspired by a Chinese poem. It stands as a model for how UNESCO Creative Cities can co-create artistic outputs while building lasting city-to-city literary ties. (Image © Nanjing City of Literature)



Literature festivals and book fairs

Book fairs and literary festivals have served as key platforms for bilateral exchange. 155 British publishing exhibitors attended 2025 Beijing International Book Fair⁹⁸ and 65 Chinese exhibitors attended the London Book Fair 2025⁹⁹. Since China's Market Focus year at London Book Fair in 2012, curated UK-China dialogues have continued in events like the London Literature Festival and Edinburgh International Book Festival, often with support from cultural institutes.

Sinoist Books: telling sinophone stories

Sinoist Books¹⁰⁰ is a UK-based independent publisher dedicated to bringing contemporary Sinophone literature to English-speaking audiences. As a spin-off from Alain Charles Asia (the first Western publisher to establish an office in mainland China), it received National Portfolio Organisation (NPO) status from Arts Council England in 2022.



One-way Street media (Owspace)

One-way Street¹⁰¹ is a prominent Chinese literary platform producing content across publishing, audio, video, and live events. It has played an active role in promoting British literature to Chinese audiences. In 2017, Dandu collaborated¹⁰² with the British Library to promote their touring exhibitions¹⁰³ in China. In 2018, it published a special edition mook¹⁰⁴ featuring first Chinese translations of works by emerging UK authors. In 2021, it hosted an online international literature roundtable, inviting UK literary curators and writers and other international literature professionals. In 2024, the editorial team travelled to Outland Publishing Fair¹⁰⁵ in London. (Image © One-way Street Media)



Regional development and cultural policies

How this chapter is structured

This chapter offers regional analysis across four key areas in Mainland China—North & Central, East, South, and Southwest—featuring 11 representative cities.

- **North and Central:** Beijing, Xi'an (Shaanxi Province), Wuhan (Hubei Province)
- **East:** Shanghai, Hangzhou (Zhejiang Province), Suzhou (Jiangsu Province), Nanjing (Jiangsu Province)
- **South:** Guangzhou (Guangdong Province), Shenzhen (Guangdong Province)
- **Southwest:** Chengdu (Sichuan Province), Chongqing

For each city, we summarise:

- **Policy highlights:** strategic direction and priorities in recent plans at city-level (for national-level cultural governance overview please see chapter one)
- **Cultural highlights:** the city's distinctive cultural strengths and characteristics
- **Profiles of key institutions:** leading players and emerging platforms

North and Central

Beijing



1. Beijing

1.1 Policy highlights

Key policy document: *Beijing 14th Five-Year Plan Period Cultural and Tourism Development Plan*¹⁰⁶

Beijing, as China's capital, serves as a national and international cultural leader. Its 14th Five-Year Plan for Cultural and Tourism Development positions the city as a global cultural hub with a focus on quality, innovation, and international engagement. Core priorities include:

- **Strengthening Beijing's cultural brand** through heritage protection, public access, and world-class cultural infrastructure.
- **Fostering innovation** in the creative industries, with investment in digital culture, immersive formats, and intellectual property development.
- **Expanding international cultural exchanges**, particularly with Belt and Road countries. The city plans to host major cultural events like the China Opera Festival and the Beijing International Music Festival, aiming to attract global attention, as well as deepening cultural ties with Hong Kong, Macau and Taiwan.
- **China's film powerhouse:** Beijing combines the top talent pipeline, studio infrastructure, top state-owned and private film enterprises, and policymaking authority, making it an essential hub for any film dealings in China. As of 2025, Beijing's film industry remains the largest in China, with 11,000 registered film companies (7.4% of the national total), producing 775 films annually (25% of the country's output). So far, four of the top 10 highest-grossing Chinese films were Beijing-produced. The market performance is strong, with annual box office revenue reaching 2 billion RMB (5% of the national total) and the highest per-screen attendance rate in China¹⁰⁸. Beijing is also home to two top Chinese schools of film, performing arts and theatres, Beijing Film Academy and The Central Academy of Drama.
- **Engine for performing arts productions:** Since 2023, "building a Capital of Performing Arts" has become Beijing government's priority, covering traditional forms such as opera, drama, Peking opera, musicals, as well as emerging formats like immersive theatre. In 2024, the city hosted 57,000 commercial performances, attracting over 12.8 million attendees and generating box office revenues exceeding approx. 3.9 billion RMB. Private troupes are highly active, with over 700 performing arts groups in the city, more than 90% of which are privately owned. The National Centre for the Performing Arts and Tianqiao Performing Arts Centre became the only theatres nationwide with annual box office earnings surpassing 200 million RMB¹⁰⁹. Supported by major academies like the Central Academy of Drama and Beijing Dance Academy, Beijing is a constant engine for new productions.
- **Heart of China's visual culture:** With major arts educational institutions like Central Academy of Fine Arts, Tsinghua University's Academy of Arts & Design, Beijing Institute of Fashion Technology, and the Communication University of China, Beijing remains the heart of China's visual arts and cultural scene. Many major museums and academies also maintain professional-grade facilities capable of hosting large-scale international exhibitions, usually the first stop for international touring exhibitions.
- **Music capital of China:** Now, Beijing has the fastest-growing music industries in China. In 2024, the city's live music market generated over £4 billion in ticket sales—a remarkable 73.6% year-on-year increase¹⁰⁷. With deep roots in rock, hip-hop, Beijing is also home to traditional Peking opera and top music conservatories such as the *Central Conservatory of Music* and *China Conservatory of Music*. Major labels and music production companies mostly choose Beijing for their offices given proximity to regulators and the overall entertainment industry including TV and film, which often intersect with music in soundtracks and talent shows.

1.2 Cultural highlights

1.3 Key institutions

Music

- **Modern Sky¹¹⁰**: China's largest independent music label founded in 1997. It launched Modern Sky UK in partnership with Liverpool Sound City in 2016 and launched its international artist booking service Modern Sky International Artist Booking Agency in 2018, with further partnership with ATC Group in 2024.
- **Haze Sounds¹¹¹**: a music booking agency and a great gateway for international artists touring China. It is dedicated to bringing high-quality, well-known independent bands and musicians from abroad—particularly those popular among young audiences in Europe, the UK and America—to perform in China.
- **MAO Livehouse¹¹²**: China's most influential venue chain renowned as the "Premier Rock Stage in China" for its professional acoustic design, world-class sound systems, and annual scale of over 2,000 performances. Founded in Beijing, it now operates 15 branches across the country.
- **The Beijing International Music Festival (BMF)¹¹³**: A cornerstone of the city's cultural landscape, regularly features world-class musicians and ensembles from the U.S., U.K., Germany, South Africa, Austria, France, and Italy, solidifying its status as a globally resonant brand.
- **China Symphony Orchestra¹¹⁴**: a state-level performing arts institution founded in 1977 directly under the State Council, regularly providing performances for major national and diplomatic events. Having collaborated with numerous world-renowned conductors and musicians, it serves as a key player in international musical corporations.
- **Split Works¹¹⁵**: a music promotion agency founded in 2006 by Archie Hamilton and Nathaniel Davis, recognised as a pioneer in introducing international artists to China while elevating local talent, such as indie, folk and rock.

Film:

- **China Film Group Corporation¹¹⁶**: China's largest state-owned integrated film enterprise with exclusive import rights for international films into the Chinese market. It releases over 600 films annually and controls 30% of China's cinema screens.
- **China Film Archive (CFA)¹¹⁷**: Established in 1958, CFA is a state-owned film research institution and film archive, responsible for collecting, preserving, and researching Chinese cinematic heritage. It plays an active role in international exchanges, collaborating with 30 countries in 2024 alone for film exhibitions and cultural exchanges.
- **Wanda Film¹¹⁸**: China's leading private film conglomerate, operating across production, distribution, and screening with an annual release slate exceeding 600 films. It commands 16.5% of the national box office market share and directly operates 709 cinemas. Formerly owner of the UK's Odeon and UCI cinemas¹¹⁹.
- **Beijing International Film Festival¹²⁰**: Founded in 2011, it is one of China's two biggest film festivals, along with the Shanghai International Film Festival. It is co-hosted by the Beijing Municipal People's Government and China Media Group under the guidance of the China Film Administration.

Performing Arts:

- **National Centre for the Performing Arts¹²¹**: Beijing's flagship and premium venue for music and performing arts, with strong links to 131 foreign embassies, making it the ideal partner for top international artists performing in China. Designed by French architect Paul Andreu.
- **Beijing People's Art Theatre¹²²**: As China's most representative national drama company, and a key player in international cultural exchange, it made history in 1980 as the first Chinese drama troupe to tour Germany, France, and Switzerland. In recent years, they have engaged in collaborations and exchanges with NT Live and the Cambridge Shakespeare Festival¹²³, particularly in the areas of performances and training. Since 2024, the Theatre has hosted the BPAT International Theatre Festival, inviting renowned troupes from multiple countries to perform in China.

- **National Ballet of China¹²⁴**: Established in 1959, it is China's only national-level ballet group and has toured over 30 countries in its 65-year history.
- **Beehive Theatre¹²⁵**: Established in 2008 by renowned Chinese drama director Meng Jinghui. Dedicated to avant-garde theatre, it hosts a variety of cultural events, including theatre salons, photography exhibitions, and concerts, making it a significant landmark in Beijing's contemporary theatre scene.
- **Jingju Theatre¹²⁶**: Also known as Peking opera theatre, is a national-level Peking Opera performing arts troupe in China. Compared to modern performing arts such as drama, musicals, and even stand-up comedy, this traditional Chinese theatrical form has a relatively smaller contemporary audience. Nonetheless, the theatre is committed to preserving and promoting this cultural heritage and serves as a bridge for international cultural exchange.

Visual Arts:

- **National Museum of China¹²⁷**: It is Asia's largest museum, serving as China's paramount cultural institution, showcasing 5,000 years of civilisation through iconic exhibitions. As a global cultural bridge, it partners with more than 100 international museums, including the British Museum and leads multilateral alliances like the Silk Road Museums Alliance. Recent initiatives include digital collaborations with 33 countries and rotating exhibitions in Australia/Europe.
- **National Art Museum of China¹²⁸**: As China's only national-level art museum, it officially opened in 1963 and has since played a crucial role in preserving the nation's cultural heritage while establishing a robust foundation for future artistic development through its systematic acquisition of exceptional artworks. The institution currently safeguards a distinguished collection exceeding 130,000 pieces, spanning classical and contemporary periods while encompassing both Chinese and international masterworks.

- **Beijing International Art Biennale¹²⁹**: Established in 2003 and organised by the China Artists Association, it is Asia's most authoritative contemporary art exhibition, showcasing large-scale thematic exhibitions with global participation (over 100 countries) while promoting cross-cultural dialogue through painting, sculpture, and new media art.
- **UCCA Centre for Contemporary Art¹³⁰**: UCCA is an independent, non-profit art institution dedicated to public engagement. Founded in 2007 by Belgian collectors Guy and Myriam Ullens, UCCA collaborates extensively with both established and emerging artists from China and around the world.
- **798 Art District¹³¹**: 798 Art District is Beijing's most globally influential contemporary art hub, home to over 400 cultural institutions, blending art exhibitions and creative events with its distinctive industrial heritage. Among its key art centres are the UCCA Centre for Contemporary Art, Bahrain Cultural Centre, and Persian Cultural Art Centre. The district also serves as the primary venue for annual events such as Beijing Design Week.

Literature:

- **Beijing International Book Fair¹³²**: Asia's most internationalised book trade event, with strong UK participation.
- **One-way Street media¹³³**: A hybrid literature and cultural media platform with regular promotion of UK literature.

North and Central

Xi'an
(Shaanxi Province)



2. Xi'an (Shaanxi Province)

2.1 Policy highlights

- **Key policy document:** *Xi'an 14th Five-Year Plan Period Cultural and Tourism Development Plan*¹³⁴
- Xi'an is the capital city of Shaanxi Province, its cultural policies include developing performing arts, music, film, theatre, and visual arts to establish itself as "China's Capital of Performing Arts". As the starting point of the Silk Road, Xi'an will establish the "Silk Road Tourism Cities Alliance", strengthen cooperation as an "East Asia Cultural Capital", host the Euro-Asian Economic Forum and international arts festivals. These efforts aim to enhance the city's cultural soft power and international influence through its "Millennial Capital - Always Welcome to Chang'an" branding campaign.

2.2 Cultural highlights

- **Heritage-reimagined performing arts:** As an ancient capital of China, Xi'an ranks among China's foremost cities in historical heritage-related performing arts, staging nearly 36,000 performances and welcoming over 16 million visitors in 2024.
- **Maturing base of international music brokers with vibrant consumer base:** One of the top hubs for China's rock and hip-hop music, Xi'an is also a mandatory touring destination for many Chinese musicians.
- **Crucial cultural heritage and museums:** As one of China's ancient capitals with 13 dynasties and a cradle of Chinese civilisation, Xi'an boasts profound history, abundant cultural relics, and rapid advancements in archaeology, cultural heritage exhibitions, and digital preservation.

2.3 Key institutions

- **Xi'an Performing LIVE:** Under state-owned Xi'an Performing Arts Group, it is Xi'an's largest music venue matrix, managing nearly 20 venues across the city.
- **SoundFact:** Affiliated with Shaanxi Performing Arts Centre, it is an emerging independent music agency dedicated to end-to-end operations for international bands performing in China.
- **Qujiang Cultural Tourism**¹³⁵: China's leading cultural tourism operator, renowned for managing Shaanxi's iconic heritage sites and several culture-related performing arts, and major cultural venues.
- **Xi'an Aiyue Theatre Management**¹³⁶: A subsidiary of the Qujiang Cultural Tourism, and the operator of several key venues.
- **Shaanxi Province Art Museum**¹³⁷: Founded in 1984, it is the only professional art museum in western China and has been listed as one of China's top ten art museums.
- **Shaanxi History Museum**¹³⁸: Xi'an's most prestigious museum and China's first large-scale modern national museum. It is particularly renowned for its Shang-Zhou bronzes, Han-Tang gold/silver artefacts, and Tang dynasty tomb murals.
- **Terracotta Warriors:** Officially recognised as Emperor Qinshihuang's Mausoleum Site Museum, is the world's largest ancient military museum, featuring over 8,000 life-sized terracotta warriors and horses that recreate the battle formations of the Qin Dynasty. It is acclaimed as the *Eighth Wonder of the World*.

North and Central

Wuhan (Hubei Province)



3. Wuhan (Hubei Province)

3.1 Policy highlights

- **Key policy document:** *Wuhan 14th Five-Year Plan Period Cultural and Tourism Development Plan*¹³⁹
- Wuhan's cultural policies have been centred on establishing itself as an "international cultural and tourism destination", with particular emphasis on artistic innovation, industrial upgrading and international collaboration. The municipal strategy prioritises technological integration, promoting 5G and AI applications within cultural contexts while enhancing the tourism consumption environment through initiatives encompassing night-time economies, performance tourism and creative cultural product development. Cultural exchange forms a cornerstone of Wuhan's current policy framework, with preparations underway for collaborative programmes involving India, France, South Korea and other nations.

3.2 Cultural highlights

- **UNESCO Creative City of Design (2017)**
- **Strong cultural heritage in opera and music:** Wuhan owns 15 national-level intangible cultural heritage items, among which opera and music make up a large proportion¹⁴⁰. This points to the city's cultural importance in preserving the art of Han Opera, Chu Opera, Peking Opera, Hubei drums and Hubei melodies, which are still widely performed in local theatres such as Qintai Grand Theatre, Wuhan Peking Opera Theatre and Wuhan Han Opera Theatre. It is also home to intangible cultural heritage inheritors of Han embroidery, wood sculpting and Xiaogan paper-cutting.
- **One of the pilot cities for faster approval for foreign commercial performances:** Wuhan has emerged as an increasingly popular destination for international musicians planning China tours, it is the first touring city for British bands Maruja and Temples in 2025.

3.3 Key institutions

- **Qintai Music Festival:** An annual international music event hosted by the Wuhan Municipal Government since 2001, attracting international music institutions like Royal Philharmonic Orchestra, The King's Singers, and BBC National Orchestra of Wales.
- **Hubei Province Museum**¹⁴¹: the province's most important institution for the preservation, research, exhibition, and education of its collection and cultural heritage.
- **Wuhan Art Museum**¹⁴²: A nationally accredited art institution, operates two venues, the Hankou Pavilion and Qintai Pavilion.

East

Shanghai



1.Shanghai

1.1 Policy highlights

- **Key policy document:** *The 14th Five-Year Plan for Building Shanghai into a Socialist Cultural Metropolis*¹⁴³
- In the 14th Five-Year Plan, Shanghai positioned itself as a *Socialist Cultural Metropolis*, focusing on literature, film, television, theatre, fine arts, community culture, and online arts. The city aims to advance the development of Shanghai as a global hub for film/TV production and an international art trading centre, establish it as Asia's performing arts capital and the global Esports capital, build highlands for online cultural industries and creative design, and strive to achieve world-class influence in E-sports. Shanghai will also support the establishment of overseas branches for local cultural enterprises and encourage international collaborations in film, music, and theatre.
- **China's best cinema audience:** As the cradle of Chinese cinema in the early 20th century, Shanghai has the best cinema audience as well as the strongest local government support for artistic films, which aims to build Shanghai as China's City of Film. The city is home to over 7,000 film enterprises, accounting for one-third of China's total¹⁴⁴. With 379 cinemas citywide, it has consistently ranked first among Chinese cities for box office revenue, screen count, and movie attendance for multiple consecutive years¹⁴⁵.
- **Highly commercialised music industry:** Shanghai's music industry stands as China's No.1, boasting the nation's most comprehensive supply chain and highest level of internationalisation. In 2024, the city hosted over 57,000 commercial performances, generating 5.17 billion RMB in box office revenue—with musicals alone accounting for 56% of the national total. Shanghai's trendsetting audience demonstrates the strongest demand for mid-to-high-end cultural offerings, which makes it the test market for new music tech or formats.

1.2 Cultural highlights

- **Performing arts leadership:** Often considered the commercial and cosmopolitan counterpart to Beijing, Shanghai is China's most internationalised performing arts market, known for its musicals, contemporary dance, and immersive theatre. It was the first Chinese city to produce *Mamma Mia!* and *Cats* in Chinese and remains the national test-bed for international shows. Shanghai Grand Theatre and China Shanghai International Arts Festival anchor the ecosystem, with state and private sector support for new formats like immersive drama and community theatre.
- **Global art market hub:** leveraging its financial and commercial status, Shanghai has become a leading city for art trading and international exhibitions, fostering collaborations between local and international artists, galleries, and museums, aiming to create a thriving ecosystem for visual arts. Events like PHOTOFAIRS Shanghai and the Power Station of Art's Biennale strengthen its global standing.
- **Capital of online literature:** Shanghai is home to 38 publishing houses, firmly placing its publishing industry among China's top three. Official figures reveal that Shanghai achieved a 97.15% comprehensive reading rate among its residents in 2024¹⁴⁶. Shanghai is the undisputed capital of China's online literature, generating 11.8 billion RMB in 2024—over 30% of the national market¹⁴⁷. In 2025, the city will prioritise expanding online publishing enterprises overseas, reinforcing its role as a global cultural exporter.

1.3 Key institutions

Performing Arts:

- **Shanghai Grand Theatre¹⁴⁸**: It is China's first international theatre, and a critical gateway for international performing arts entering the Chinese market. In 2002, it became the first Chinese venue to stage the original production of *Les Misérables*, subsequently premiering multiple other world-class musicals in China.
- **Shanghai Dramatic Arts Centre¹⁴⁹**: It is the only state-owned cultural enterprise in Shanghai, with a fully integrated industrial chain encompassing project planning, stage art creation, production, stagecraft storage, theatre architectural consulting, venue management, marketing, arts education, and actor representation. It is also Shanghai's sole state-owned drama troupe.
- **Shanghai Oriental Art Centre¹⁵⁰**: It stands as one of Shanghai's iconic cultural landmarks, designed by French architect Paul Andreu, and represents a successful model of modern theatre operation and management in China.
- **China Shanghai International Arts Festival¹⁵¹**: Co-hosted by the Ministry of Culture and Tourism, it is a premier national-level international arts festival, and one of the most influential cultural events in the Asia-Pacific region.
- **Shanghai Modern Drama Valley¹⁵²**: Established in 2009 as a cultural brand specialising in the theatre industry, it integrates domestic and international theatrical resources through performances, community theatre, and the One Drama Awards.
- **Shanghai International Dance Centre¹⁵³**: It is China's first professional theatre dedicated exclusively to dance arts, featuring a young dancers' incubation platform and operating the *Dance Out of the Box Festival*.

Visual Arts:

- **West Bund**: The key art district in Shanghai, it encompasses the world-class contemporary art institution West Bund Museum¹⁵⁴ (which has partnership with France's Centre Pompidou), West Bund Art Center¹⁵⁵ (host of the West Bund Art & Design Fair), and the Long Museum's West Bund branch¹⁵⁶ (China's most expansive and influential private art institution).
- **Museum of Art Pudong¹⁵⁷**: Officially opened on 8 July 2021. As China's first state-owned art institution with international exchange at its core, it has forged deep collaborations with leading global museums such as Tate Modern, hosting 20+ major exhibitions in just four years — including Tate's prestigious collection showcases and special exhibitions from the Musée d'Orsay.
- **Shanghai Museum¹⁵⁸**: Established in 1952, it is China's premier museum of ancient Chinese art. In 2024, its East Hall opened as a dedicated ancient art museum, marking the institution's expansion into a dual-venue operation.
- **Power Station of Art¹⁵⁹ and Shanghai Biennale¹⁶⁰**: Established in 2012, it is China's first public contemporary art museum and the primary venue for the Shanghai Biennale. Shanghai Biennale was established in 1996, has now become China's most internationally influential art exhibition and one of Asia's foremost international biennales.
- **PHOTOFAIRS Shanghai¹⁶¹**: Asia-Pacific's leading international art fair dedicated to photography and moving image, established in 2014 to foster cross-cultural dialogue and innovation in visual arts through curated exhibitions, global gallery collaborations, and public programmes.

Film:

- **Shanghai International Film Festival¹⁶²**: Formed in 1993, sponsored by the Shanghai government and film institutions, it is a major platform for foreign and Chinese films, featuring competitions, markets, and forums that encourage international exchange. The festival was accredited by the International Federation of Film Producers Associations as the first and only international competitive feature film festival in China to this day.
- **Shanghai Film Group¹⁶³**: Established in 1957, it ranks among China's largest state-owned film conglomerates, with a fully integrated ecosystem spanning production, distribution, exhibition, technology bases, and film-themed entertainment parks.
- **Shanghai Art Film Federation¹⁶⁴**: Established in 2013, it is a long-standing advocate for international arthouse cinema, dedicated to promoting Chinese and international art films through curated screenings and global exhibitions. In 2024, it organised British FilmMasters Retrospective, curated eight films spanning over half a century from seven renowned directors. Participants included iconic British film companies such as Working Title Films and BBC Films, alongside international heavyweights like A24 and Film4.

Music:

- **Shanghai Symphony Orchestra¹⁶⁵**: Established in 1879 and reorganised in 1956, it stands as one of Asia's oldest symphony orchestras and is acclaimed as the "Foremost Orchestra of the Far East". It has shaped China's orchestral canon through premieres of 200+ native compositions while forging partnerships with the New York Philharmonic and Deutsche Grammophon, cementing its legacy as the nation's symphonic vanguard.
- **JZ Festival Shanghai¹⁶⁶**: Launched in 2005, it has grown into China's largest and Asia's second-largest jazz festival.
- **YUYINTANG Livehouse¹⁶⁷**: Founded in 2004, it is one of Shanghai's most iconic independent music venues. As a vital incubator for local bands and indie artists, it hosts over 1,000 annual performances spanning rock, folk, electronic, and diverse genres.

Literature:

- **Shanghai Book Fair¹⁶⁸**: Co-hosted by the National Press and Publication Administration and Shanghai Municipal Government since 2004, it stands as one of China's most influential public reading festivals, held annually every August at the Shanghai Exhibition Centre.
- **Yuewen Group¹⁶⁹**: As China's largest online literature conglomerate under Tencent, it is headquartered in Shanghai. It operates multiple domestic platforms including Qidian Chinese Network and QQ Reading, alongside its global WebNovel platform.

East

Hangzhou
(Zhejiang Province)



2. Hangzhou (Zhejiang Province)

2.1 Policy highlights

- **Key policy document:** *The 14th Five-Year Plan for the Development of Hangzhou's Culture, Radio, Television, and Tourism*¹⁷⁰
- Home to many of China's rising tech stars, including Alibaba, DeepSeek, Unitree Robotics – pioneer in humanoid robots, and Game Science – the creator of China's first AAA video game *Black Myth: Wukong*. This vibrant ecosystem blends cutting-edge innovation with rich cultural heritage, making the city a unique testbed where ancient traditions meet futuristic technologies. During the 14th Five-Year Plan period, Hangzhou's cultural policy focuses on heritage preservation, digital innovation, and global engagement. The city aims to enhance its three UNESCO World Heritage sites (West Lake, Grand Canal, and Liangzhu Ruins) while promoting "Song Dynasty culture" and intangible heritage like tea and silk craftsmanship. Digitally, Hangzhou leverages its "City Brain" platform to boost smart tourism, virtual exhibitions, and online cultural events, positioning itself as a "living museum" of Chinese tradition and modernity.

2.2 Cultural highlights

- **China's leading city in cultural-technology integration:** Across music, performing arts, literature, museums, and even gaming, Hangzhou exemplifies holistic culture-technology integration, equally prioritising cultural substance and technological innovation.
- **A maturing market for mid-to-high-end cultural consumption:** Compared to other second-tier cities, Hangzhou's consumers exhibit more sophisticated and higher cultural demands. In 2024, the number of concerts increased by 470% year-on-year, with audience numbers and box office revenues rising by 409% and 480.9%, respectively¹⁷¹.
- **A city within China's museum boom:** Home of China Academy of Art, Hangzhou is an important city for China's cultural and creative industries. As of 2025, Hangzhou boasts 299 museums, ranking second in China only to Beijing in total number¹⁷².

2.3 Key institutions

- **Hangzhou Future International Performing Arts Centre:** With the growing demand in Hangzhou's performing arts market, this future arts centre exemplifies the city's untapped potential, positioning it as a key destination for international artists touring in China.
- **Zhejiang Art Museum**¹⁷³: Renowned for its distinctive Chinese architectural style and holding over 30,000 artworks in permanent collection, this institution annually hosts 50+ exhibitions to promote Chinese artistic heritage.
- **China Design Museum**¹⁷⁴: It is China's first museum dedicated to modern design, featuring a core collection of Bauhaus works and serving as a hub for design research and education.
- **China National Silk Museum**¹⁷⁵: It is the world's largest silk-themed museum and China's first state-level textile heritage institution.
- **BY ART MATTERS**¹⁷⁶: Independent contemporary art space with a focus on experimental curation.
- **NetEase Cloud Music**¹⁷⁷: China's second-largest music streaming platform, with over 200 million monthly active users and the country's largest independent musician community (400,000+).
- **West Lake Music Festival**¹⁷⁸: Held annually since 2008, it is one of China's most iconic outdoor music events, attracting 50,000+ attendees.

East

Nanjing
(Jiangsu Province)



3. Nanjing (Jiangsu Province)

3.1 Policy highlights

- **Key policy document:** *Nanjing 14th Five-Year Plan Period Cultural and Tourism Development Plan*¹⁷⁹
- Nanjing, the capital of Jiangsu Province, is a historic ancient capital of China. During the 14th Five-Year Plan period, Nanjing's cultural sector will focus on technological enablement and deeper convergence, anchored by its development as the UNESCO City of Literature and Capital of Museums. Key priorities include advancing digital creative industries and esports/gaming sectors, whilst strengthening high-calibre artistic output, revitalising cultural heritage assets, and upgrading industrial clusters.

3.2 Cultural highlights

- **Pioneered innovative policies on performing arts:** The city notably launched China's first "high-quality production subsidy" scheme. In 2024, the city hosted 12,890 performances, with over 70% of attendees coming from outside Nanjing, solidifying its status as a key driver of cultural tourism growth.
- **China's only city listed as UNESCO City of Literature:** As a time-honoured ancient capital, Nanjing has long been a powerhouse of Chinese literature, serving as a central hub for poetry and prose throughout history. In the modern era, Nanjing's publishing industry remains at the forefront, home to multiple nationally leading publishing conglomerates.

3.3 Key institutions

- **Jiangsu Centre for the Performing Arts**¹⁸⁰: China's largest modern grand theatre and Asia's biggest theatre complex, housing four main halls (opera, concert, drama, and variety). In 2025, it will launch its inaugural Drama Festival and 'Voice of Jiangnan' Music Festival.
- **Jiangsu Performing Arts Group**¹⁸¹: Established in 2001 as Jiangsu Province's flagship state-owned performing arts conglomerate, it consolidates 11 regional troupes, spanning 13 genres from Peking opera to Kun opera and Xi opera.
- **Nanjing Museum**¹⁸²: Originally established in 1933 as the National Central Museum, it now holds National First-Class Museum status with a 430,000-piece collection.
- **Jinling Art Museum**¹⁸³: A public nonprofit art institution under Nanjing Municipal Government, was transformed from a former textile factory in 2013. It is dedicated to collecting contemporary Nanjing artists' works and promoting regional culture.
- **Jiangsu Art Museum**¹⁸⁴: This museum holds the distinction of being modern China's first national-level art museum, tracing its origins to the National Art Exhibition Hall established in 1936.

East

Suzhou
(Jiangsu Province)



4. Suzhou (Jiangsu Province)

4.1 Policy highlights

- **Key policy document:** *Suzhou's 14th Five-Year Plan for Integrated Development of Culture and Tourism*¹⁸⁵
- During its 14th Five-Year Plan period, Suzhou will focus on achieving exponential growth in its cultural industries by developing a modern industrial framework with digital culture at its core. The city plans to establish industrial clusters demonstrating both regional leadership and innovative capacity, positioning itself as a national centre for digital cultural industries and a model region for integrated cultural-tourism development. The development approach prioritises technological advancement to drive innovation across multiple sectors including traditional arts, cultural innovation and digital content production, effectively merging heritage craftsmanship with contemporary techniques. Furthermore, through intensified cultural-tourism integration and strategic promotion of its "Jiangnan Culture" brand, Suzhou aims to reinforce the cultural industry's multifaceted role in stimulating broader socioeconomic progress.

4.2 Cultural highlights

- **Integration of performing arts + cultural tourism:** As a key tourist city in China, Suzhou integrates traditional folk arts such as Suzhou ballad-singing, Kunqu Opera with fostering immersive cultural-tourism performances, staged within Suzhou's classical gardens, such as live-action productions *A Dream in the Garden* (游园惊梦) and *Celestial Love* (天仙缘).
- **Emerging city in integrating technology and visual art:** The integration of art and technology represents a key development direction for Suzhou.

4.3 Key Institutions

- **Suzhou Shishan Grand Theatre:** Jointly managed by Suzhou New District Culture and Tourism Group and Shanghai Grand Theatre, the venue opened in 2024 as a key partner for introducing international productions to the city.
- **Suzhou Museum**¹⁸⁶: It has become one of China's most celebrated museums for its architectural style that seamlessly blends classical garden aesthetics with modernist design principles.
- **Yinshan Lake Art Museum**¹⁸⁷: a private art institution that integrates exhibition curation, academic research, public education, cultural exchange, and aesthetic space design. As one of China's most active contemporary art platforms, it has established itself as a new benchmark for museum development in the country.
- **Suzhou Bay Digital Art Museum**¹⁸⁸: Designed by Pritzker Prize laureate Christian de Portzamparc, this landmark is the world's first full-scene digital art complex. It pioneers AI, VR/AR, and IoT technologies, solidifying Suzhou's leadership in digital art innovation.

South

Guangzhou (Guangdong Province)



1. Guangzhou (Guangdong Province)

1.1 Policy highlights

- **Key policy document:** *Guangzhou's 14th Five-Year Plan for Culture and Tourism*¹⁸⁹
- Guangzhou, historically known as Canton, serves as the provincial capital of Guangdong and occupies a pivotal position within the Guangdong-Hong Kong-Macau Greater Bay Area. The city hosts the *Canton Fair*, China's largest and longest-running trade exhibition established in 1957 under the Ministry of Commerce, which remains a vital platform for international commerce and cultural exchange. Complementing this is the annual *Guangzhou Cultural Industries Fair*, which by January 2025 had successfully convened six editions, emerging as a significant platform for creative industries.

1.2 Cultural highlights

- **Performing arts high ground of southern China with explicit government backing:** The municipal government offers up to 5 million RMB in subsidies for overseas touring productions. Plus, its stage equipment sector (including lighting and audio systems) dominates 80% of the domestic market¹⁹⁰.
- **Leading city of museums and visual arts in Southern China:** Guangzhou Academy of Fine Arts is one of China's Eight Major Art Academies and a pioneer in design and art education. Guangzhou holds the distinction of being the earliest city in China to establish a modern museum, with the Guangzhou Municipal Museum founded in 1929. As of 2025, the city boasts 73 museums, collectively housing over half of Guangdong Province's total museum artefacts¹⁹¹.
- **Comprehensive film industry chain:** Covering creation, filming, production, distribution, and exhibition. In 2024, the city had 89 films registered with the National Film Administration, with a total box office of 1.3 billion RMB, ranking 4th nationwide.
- **The birthplace of China's commercial pop industry in the 1980s:** Now, it still remains an important music city, home to Xinghai Conservatory of Music, the only music academy in South China.

1.3 Key institutions

- **Guangzhou Opera House**¹⁹²: A premier performing arts venue in Southern China and a recurring host of the Silk Road International Theatre Alliance annual conference. Hosting over 400 annual performances, it features world-class ensembles like the Royal Philharmonic Orchestra and London Philharmonic Orchestra.
- **Guangdong Modern Dance Company**¹⁹³: China's first professional contemporary dance ensemble which was established in 1992. It has hosted the Guangdong Dance Festival annually since 2004.
- **Guangdong Museum of Art**¹⁹⁴: Opened in 1997 as one of China's first National Art Museums, specialising in modern coastal Chinese art and contemporary art research. In 2024, the new Baietan Branch was officially inaugurated in the *Greater Bay Area Arts Centre at Baietan*.
- **Guangdong Museum**¹⁹⁵: It is the largest and most comprehensive museum in Southern China, serving as Guangdong Province's sole provincial-level museum.
- **China (Guangzhou) International Documentary Festival**¹⁹⁶: Officially launched in 2003, it remains China's only dedicated documentary festival, now recognised as Asia's largest and among the world's top eight documentary events.
- **Guangzhou Symphony Orchestra**¹⁹⁷: Founded in 1957, it stands as one of China's earliest-established symphony orchestras and remains the country's only orchestra to have toured all five continents.
- **Xinghai Concert Hall**¹⁹⁸: Inaugurated in 1998, it is renowned for world-class acoustics and hosting elite ensembles like the London Symphony Orchestra.

South

Shenzhen
(Guangdong Province)



2. Shenzhen (Guangdong Province)

2.1 Policy highlights

- **Key policy document:** *The 14th Five-Year Plan for the Development of Culture, Sports, and Tourism in Shenzhen*¹⁹⁹
- Shenzhen, the modern metropolis that links Hong Kong to China's mainland. Once a manufacturing hub, now becoming an innovation hub and active player in digital cultural industries. Its cultural policy is centred on digital innovation and international integration, driving the high-quality development of the digital cultural industry, such as supporting the application of 5G, AI, and other technologies in film, gaming and e-sports; revitalising historical landmarks like Nantou Ancient Town and promoting intangible cultural heritage-themed tourism; providing substantial financial support to creative enterprises. The city is also advancing the construction of ten major cultural facilities, such as the Shenzhen Opera House, Shenzhen Science and Technology Museum, Shenzhen Creative Design Museum, Shenzhen Maritime Museum, and Shenzhen Nature Museum, forming a cluster of cultural landmarks that embody Shenzhen's global metropolis identity.

2.2 Cultural highlights

- **Emerging performing arts and music market in South China:** Shenzhen's performing arts industry is on the rise, with 4,647 commercial performances in Q1-2025. While actively introducing world-class productions, the city is also nurturing original opera works. Cross-border collaboration with Hong Kong is thriving, exemplified by co-produced projects and joint workshops.
- **Visual arts capital with great potentials:** While not a conventional art hub, its breakneck development pace—with projects like the 66,000 m² Shenzhen Art Museum (New) and the under-construction Natural History Museum—signals extraordinary potential.
- **Technological innovation and capital advantages in its music industry:** Shenzhen's music industry is particularly strong in digital music platforms, reflecting the city's tech-driven DNA. Additionally, Shenzhen boasts a highly active music consumer market.

2.3 Key institutions

Performing Arts

- **Shenzhen Opera House**²⁰⁰: The flagship project of Shenzhen's ten major cultural facilities. Upon opening, it will become southern China's most advanced opera house.
- **Poly Theatre Shenzhen**²⁰¹: A cultural anchor of the Greater Bay Area, it is operated by China's premier arts management group Poly Group. This venue is renowned for introducing international classics and championing local productions.
- **Bay Opera of Shenzhen**²⁰²: Opened in 2021, it is the city's premier performing arts venue, renowned for its wave-inspired architecture and world-class acoustics.
- **Shenzhen Opera & Dance Theatre**²⁰³: Established in 2018 as a Shenzhen municipal-owned public cultural institution, it comprises opera, dance, and chorus companies. The theatre premiered the dance drama *Wing Chun*, which innovatively integrated two local intangible cultural heritage elements—*Wing Chun martial arts* and *gambiered Canton gauze*.
- **Shekou Theatre Festival**²⁰⁴: It is a distinctive cultural event in Shenzhen. Through a 100% original incubation model, it showcases avant-garde theatrical works in unconventional venues (such as industrial ruins, shopping malls, public buses), while emphasising the cultivation of young artists and the expression of local culture.

Visual Arts

- **Design Society²⁰⁵**: It is a leading platform dedicated to culture and creative industries in 2017. Working with the Victoria and Albert Museum (V&A), Design Society pioneered a collaborative model between domestic enterprises and international state museums by establishing the V&A's first international gallery in China.
- **Shenzhen Art Museum²⁰⁶**: As the city's oldest art exhibition institution opened in 1976, it has become the cultural anchor of the Greater Bay Area's art scene.
- **Shenzhen Museum of Contemporary Art and Urban Planning²⁰⁷**: The museum is a landmark cultural institution in Shenzhen's central district, which integrates a contemporary art museum and an urban planning exhibition hall, serving as both a window into Shenzhen's urban development and its future vision.
- **Shenzhen Biennale of Contemporary Art²⁰⁸**: Established in 2015, it is a major art event focusing on the Pearl River Delta region while engaging with global contemporary discourse.
- **Shenzhen Cultural Square**: Scheduled to commence operations in September 2025, it is also one of Shenzhen's ten major cultural facilities, and will become an important gate for international exchange. In 2025, it signed agreements with Paris' Musée des Arts Décoratifs and National Furniture Archives Museum. It became the first Asia-Pacific strategic partner of the Design Museum in London through a formal MOU²⁰⁹.

Music

- **Tencent Music Entertainment²¹⁰**: China's leading online music and social entertainment platform under China's tech giant Tencent.
- **Shenzhen Concert Hall²¹¹**: A landmark cultural venue in the city which houses one of China's rarest Austrian Rieger pipe organs.
- **B10 Livehouse²¹²**: Founded in 2012, it stands as Shenzhen's premier live music destination with over 100 annual performances spanning jazz, rock, and experimental genres. It hosts two flagship festivals: the OCT-LOFT International Jazz Festival and the Tomorrow Festival.

Southwest

Chengdu (Sichuan Province)



1. Chengdu (Sichuan Province)

1.1 Policy highlights

- **Key policy document:** *The 14th Five-Year Plan for the Development of Culture, Radio, Television, and Tourism in Chengdu*²¹³
- As the capital of Sichuan Province, Chengdu is the most important cultural and economic hub in Southwest China, often referred to as the “Shanghai of Southwest China”. Chengdu's current cultural industry focuses on eight key sectors: media and film, creative design, modern fashion, music and arts, animation and gaming, exhibition and advertising, contemporary cultural heritage, and cultural equipment. Honor of Kings—China's highest-grossing mobile game of all time—is developed by Tencent Game's Chengdu Branch.

1.2 Cultural highlights

- **Southwest China's leading city in international collaboration:** Chengdu has recently staged multiple globally acclaimed productions and aims to attract more world-class performances as a key 2025 development goal.
- **Vibrant music capital in live performance with coherent industry chains and creative small venues:** The city boasts over 1,000 music-themed bars and venues, 60 professional concert halls, and more than 1,000 music studios and 2,000 training institutions. Chengdu's underground music scene thrives in small venues, ranking among China's top three for small-scale live performances.
- **Experts in online literature, children's literature, and science fiction:** Chengdu ranks 4th nationally in the number of online literature writers, shares the title of China's top three hubs for children's literature alongside Beijing and Shanghai, and has prioritised its sci-fi industrial base as a key development focus under municipal government policies.

1.3 Key institutions

Performing Arts

- **Sichuan People's Art Theatre**²¹⁴: Established in 1953, it is the most influential state-owned drama troupe in Southwest China.
- **CDHT CPAA Grand Theatre**²¹⁵: Opened in 2022, it is currently Chengdu's largest and most technologically advanced professional theatre. It is also the venue for Chengdu CPAA musical festival in 2024.

Visual Arts

- **Chengdu Museum**²¹⁶: It is the largest urban museum in Southwest China, has partnered with world-renowned institutions such as the Louvre Museum (France), British Museum (UK), Musée du Quai Branly (France), Hanover State Museum (Germany), and Hamburg Kunsthalle (Germany).
- **Jinsha Site Museum**²¹⁷: The museum is an archaeological museum dedicated to the Jinsha culture (12th–7th century BCE), and jointly nominated with the Sanxingdui site for UNESCO World Heritage status.
- **Chengdu Art Museum**²¹⁸: Under the management of the Chengdu Academy of Painting, comprising the Tianfu Art Museum and the Contemporary Art Museum, it showcases artworks with distinctive regional characteristics, blending Sichuan's cultural heritage with contemporary expressions.
- **A4 Art Museum**²¹⁹: One of the “2024 Seven Most Beautiful Museums in the World” by the French Versailles Architecture Prize”, it focuses on public education and international residency programs. Since 2011, A4 residency programme²²⁰ has collaborated with 192 international creators from 36 countries—including artists, scientists, and architects—to participate. It offers funding and workspace support, encouraging experimental creations that engage with local cultural contexts.

Music

- **Chengdu City Concert Hall²²¹**: The largest and most versatile performing arts complex in Southwest China.
- **Eastern Suburb Memory²²²**: Originally named Chengdu Eastern Music Park, it has now evolved into a cultural hub integrating music, theatre, and digital arts, with a focus on fashion design and music. The park regularly hosts cultural events, including the 3rd National Livehouse Music Industry Forum in 2024.
- **Nuspace Livehouse²²³**: A design-forward boutique selling cultural merchandise, where the performance area is tucked away in the store's secluded depths, merging retail with underground artistry, reflects Chengdu's "hidden venue" trend, blending music with lifestyle commerce.

Southwest

Chongqing



2. Chongqing

2.1 Policy highlight

- **Key policy document:** *The 14th Five-Year Plan for the Development of Culture and Tourism in Chongqing*²²⁴
- As the only directly administered municipality in western China and the economic hub of the upper Yangtze River region, Chongqing has strategically aligned its cultural development with internationalisation during the 14th Five-Year Plan period, establishing a policy framework rooted in Ba-Shu culture and driven by technological innovation. The city is actively positioning itself as an "international tourism hub", with flagship projects like the Yangtze River Cultural & Art Bay and the Ba-Shu Cultural Tourism Corridor strengthening ties with Belt and Road countries, while platforms such as the Chongqing International Culture & Tourism Exchange Centre facilitate two-way cultural exchange.

2.2 Cultural highlights

- **A consumption boom in performing arts:** Featuring immersive dramas, musicals, ballet, stand-up comedy, acrobatics, magic shows, and traditional Chinese opera, the government fuels this growth through special funding and high-tech integration, driving deep synergy between performance arts and cultural tourism.

2.3 Key institutions

- **Chongqing Grand Theatre**²²⁵: Run by Poly management, it is a landmark cultural venue in the region. In 2024, it hosted 600 performances, attracting over 500,000 attendees.
- **Shi Guangnan Grand Theatre:** A Chongqing-based theatre specialising in hosting internationally renowned productions, spanning drama, musicals, stage plays, children's theatre, and chamber concerts.
- **Chongqing Guotai Art Centre:** A landmark cultural complex integrating theatre, art exhibitions, and public spaces.

Acknowledgement

Authors

Enke Huang

Enke is an anthropologist and independent consultant specialising in participatory and international research. With expertise in cultural relations, visual arts and placemaking, she has led research and strategy projects for cultural organisations, city governments and agencies across the UK, Europe and Asia, and previously worked with the Tate Modern, British Museum and Foundling Museum. Her innovative work that combines research rigour, creativity and financial acumen has won her awards like the 2023 [Global Insights Leader \(30-under-30\)](#), 2023 Women of the Future (UK), and 2019 Royal Anthropological Institute Innovation Award. Enke has a BSc in Accounting and Business Management, an MA in Arts and Cultural Management from King's College London, and an MA in Anthropology (Distinction) from University College London.

Guanhua Su

Dr. Guanhua Su is an Associate Professor of Design and a specialist in design culture, national branding and cultural policy. Holding a PhD in Design Culture (Curtin University) and an MA in Design Anthropology (UCL), he has published extensively on Chinese cultural industries and governance.

Consultees

Who we engaged

Following internal stakeholder interviews and a review of existing research and strategic documents, the project team agreed on key sector and region focuses for this Guide and set out distinct recruitment criteria as follows: experts from the UK and China with 15+ years of experience in cultural policy-making or international collaboration with specialisation in one or more of the following fields: performing arts, film, visual arts (including cultural heritage and tourism), music and literature. UK experts from outside of London, and Chinese experts outside of Beijing, Shanghai, Guangzhou are prioritised during the recruitment process.

- **LI Huayi (she/her), Curator and producer for multiple theatre festivals in China; Director of International Programme of the Aranya Theatre Festival**
- **Dr. Hiu Man Chan, Senior Lecturer in Creative Industries, De Montfort University, Founder of UK-China Film Collab (NGO)**
- **Sid Peacock, Composer and artistic director, Surge Forward Music & Arts**
- **Joan Clevillé, Artistic Director, Scottish Dance Theatre**
- **Michelle Rocha, Head of Touring, Factory International**
- **Xiaowen Zhu, Director of esea contemporary and member of the British Council's Arts and Creative Economy Advisory Group**
- **Ling Gu, Curator and writer**
- **Zoe Xie, Literary Arts Entrepreneur**
- **Andrew Lansley, Innovation Manager, Cheltenham Festivals**
- **Haohao Wang, Independent filmmaker**
- **Shihui Weng, Director and Founder, Tempest Projects**
- **Lead guitarist in an established Chinese electro punk band**
- **Founder of a community theatre festival in Chengdu**
- **Deputy Head of Exhibition from a major contemporary art institution in Beijing**
- **Senior manager, UK public institution in China**

Appendix: about this Guide

Research background

This research was commissioned by the British Council to serve as a practical guide to highlight arts and culture opportunities in China. It aims to help UK stakeholders access these opportunities for collaboration which will further cultural development and in turn deliver economic and social benefits to China. Conducted between February and May 2025, the research provides an overview of China's arts and cultural landscape by five key genres and four key regions. Key research questions include:

1. Who are the key players, major organisations and any influential networks or groups in the arts and cultural environment in Mainland China?
2. What are new and emerging trends emerging from areas of arts and culture activities in mainland China, and the cities and regions with their own unique cultural identity and offer.
3. Where are the opportunities to support stronger relations between the arts and cultural sectors in the UK and in Mainland China?
4. Where are the additional considerations to better understand the differences and challenges in working in China?

Methodology

This research employed a mixed-methods approach, incorporating comprehensive desk research, internal document review, and in-depth interviews with experts from both the UK and China across representative genres and regions.

- **Internal review:** Reviewed existing research reports, existing global and country approach to culture relations
- **Internal consultations:** Conducted interviews with 3 key internal stakeholders
- **Comprehensive mapping research:** Conducted comprehensive desk research on China's social, digital and economic landscape; Conducted sector mapping research over 5 key arts sectors, and regional mapping research over 4 key geographical regions
- **In-depth Expert interviews:** Conducted 7 in-depth interviews with UK-China collaboration experts based in the UK and 9 in-depth interviews with UK-China collaboration experts based in China

Limitation

The qualitative insights in this report were based on a focused sample of 16 in-depth interviews across five art sectors in both the UK and China. While the sample was small, participants were strategically selected to reflect both areas of market opportunity and the British Council's current engagement priorities in China. Every effort was made to ensure diversity across professional roles, art forms, and geographic contexts. However, the scope of the project did not allow for focused engagement with underrepresented groups, including arts professionals with disabilities. The study is limited to Mainland China, in line with the British Council China's geographic remit. While not intended as a comprehensive mapping of China's arts and culture landscape, the report aims to balance depth with breadth, offering UK stakeholders—particularly those new to working in China—clear, informed entry points for collaboration.

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- ³¹ The definition of museum in China by [Chinese Museums Association](#) is: a non-profit social service institution that collects, preserves, researches, and displays evidence of human activity and the natural environment. It must be reviewed by the cultural heritage administration, approved by the relevant government departments, granted legal entity status, and open to the public. In comparison, museums in the UK as defined by [Museums Association](#) are institutions that collect, safeguard and make accessible artefacts and specimens, which they hold in trust for society. The definition includes art galleries with collections of works of art as well as museums with historical collections of objects.

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